

Complete Buyer Overview



Contents

Section 1

Find and View Suppliers	3
-------------------------------	---

Section 2

Managing your Supply Chain	12
----------------------------------	----

Section 3

How to use Analytics	18
----------------------------	----

Section 4

Standard Analytics	23
--------------------------	----

Section 5

Advanced Analytics	30
--------------------------	----

Section 6

Administrator Functionality	42
-----------------------------------	----

Find and View Suppliers

How to find and view Suppliers in the new platform

Find and View Suppliers

Find Suppliers

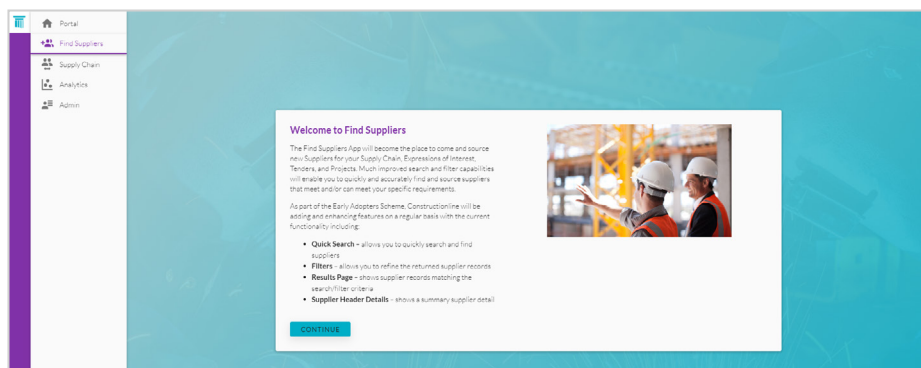
Find a Supplier	5
Find a Supplier by work category	5
Find a Supplier within your supply chain	5
Search filters	5
Levels	6
Location	6
Search results	6
View the supplier profile	6
Add to supply chain	6
Randomise	7
Add Filters	7
Can't find a supplier within the Constructionline network?	7
Filters	7

Viewing a Supplier

Supplier Profile	9
Summary page	9
Company Overview	9
You and your relationship with a Supplier	9
Accomplishments - Levels and Compliance	9
Office Locations	10
Contact Information	10
Detailed supplier information	10
Compliance tab	10

Find and View Suppliers

Once logged in, to start your search for a supplier, please select **Find Suppliers** on the left-hand navigation, and then select **'Continue'** on the overview page.



Within the new platform, there are three ways in which you can search for a Supplier:

Find a Supplier

Located at the top of the page, our main Supplier search engine allows you to search for a specific Supplier within the Constructionline network. To allow you to find the right supplier, there are three ways in which you can search for the right supplier.

- Company name
- Companies house number
- Constructionline registration number

Find a Supplier by work category

This allows you to search all suppliers within the Constructionline network by a particular work category to suit your needs. Simply select **'All suppliers'** and search for the work category within the **'Match suppliers to work categories'** search bar.

Find a Supplier within your supply chain

If you are trying to find a supplier that is currently within your supply chain, you can do this, simply select the **'Suppliers in my supply chain'** radio button. Next to the radio button you will see the unit for which you are searching the supply chain. If you have access to more than one unit, you can change the unit you are searching for.

There is also a breakdown of the segment types below it.

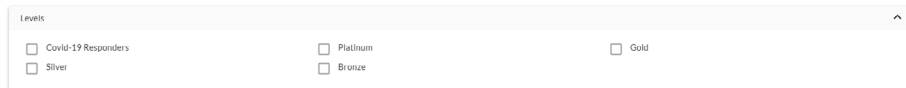
Search filters

To help you to find the right supplier for your project, we have created filters that can help you narrow your search when using our **'All suppliers'** or **'Suppliers in my supply chain'** search function.

Find and View Suppliers

Levels

If you are looking for a Constructionline member, who is currently verified to a particular level, you can now do this. Suppliers who are verified with a higher level than you require will also appear, for example, if a supplier is verified to our Gold level, they will also appear in searches for verified Silver members, giving you a larger pool of suppliers to select from.



A screenshot of a filter menu titled "Levels". It contains six checkboxes arranged in two columns. The first column has "Covid-19 Responders" and "Silver". The second column has "Platinum" and "Bronze". The third column has "Gold". All checkboxes are currently unchecked.

Location

To give you maximum flexibility, we have split out our location search into two options:

- **Area of operation** – You can now find a supplier that can work within a particular area. You can search for an area based on Post Code, Town, County or Unitary authority.
- **Location of office** – Search for a supplier that has an office within a particular area, you can add a radius to this to expand your search further.

To view the search results, select **Search** at the bottom.

Please note: The **Level** and **Location** filters can be used together, but when used together, both search criteria need to be satisfied.



A screenshot of a filter menu titled "Location". It is divided into two sections. The first section is "Area Of Operation" and contains a search input field with a magnifying glass icon. The second section is "Office located" and contains a search input field with a magnifying glass icon, a "Distance (miles)" input field, and an "Add" button with a plus sign icon.

Search results

Once you have hit the search button, you will be provided with a list of Suppliers that meet your criteria. On this results page, there are a number of actions you can take.



A screenshot of the search results header. It shows "Search (5,570 Results)" on the left and "More Filters" on the right.

View the supplier profile

Once on a particular Supplier's profile, there are a number of things you can do. We cover this in-depth in our other guide called '**Viewing a Supplier**.'

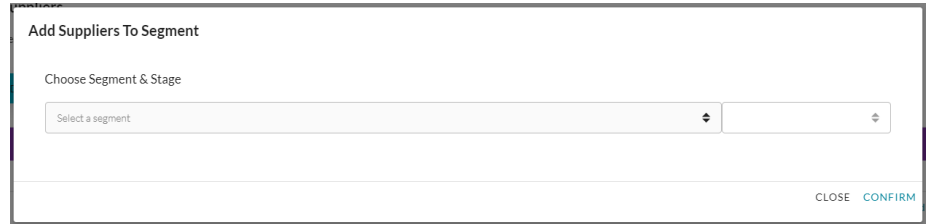
Add to supply chain

Directly from the search page, it is possible to add suppliers to your supply chain or to a specific project or segments. There are two ways to do this.

- **Individually.** Select "**Add to supply chain**" next to the supplier record.
- **Multi-select.** Use the checkboxes to the left of the supplier record to select suppliers to be added.

Find and View Suppliers

Once selected, a segment and whether that is an approved supplier will need to be selected.



Can't find a supplier within the Constructionline network?

Our new Invite Supplier feature allows you to invite suppliers that are currently not on the Constructionline platform to join. This will trigger a workflow that will invite the supplier to join, fast track will be given to any suppliers selecting this option.

Randomise

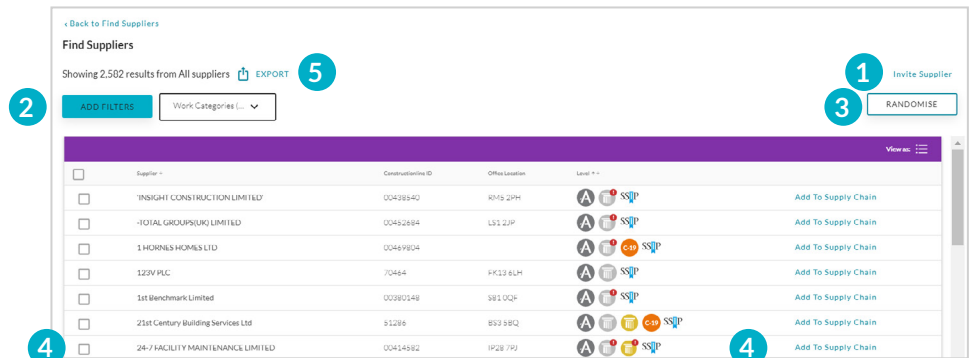
If you would like to view a random list of your results, simply hit the 'Randomise' button at the top of the search results.

Add Filters

Narrow down your search further by selecting 'Add Filter', where you can specify a membership level, location, or a company size. For more information, please view the below section on Filters.

Export Search Results

If you would like to export the search results in an Excel format, you can do this. Select the 'Export' icon, and on the next window, select 'Export'. The text 'Export' will only appear once the results have finished loading.

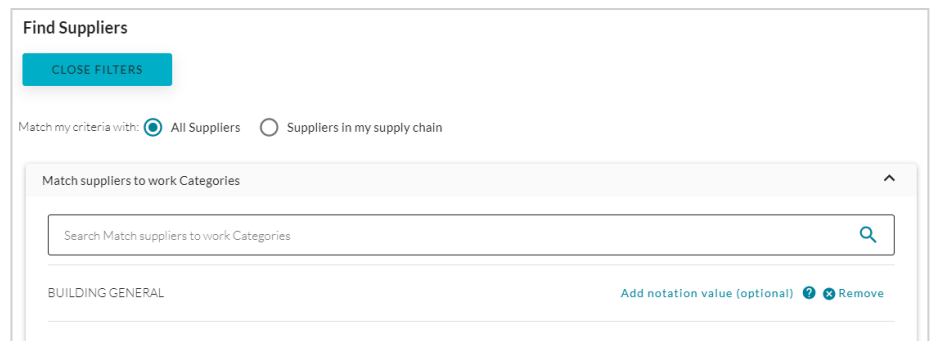


- 1 Invite Supplier
- 2 Add Filters
- 3 Randomise
- 4 Add to Supply Chain
- 4 Export

Filters

On the search page, you can either apply filters for all suppliers, or alternatively, just suppliers in your supply chain.

From here, you can also apply additional work categories or change the work category completely. Additionally, it is also possible to define a notation value for that work category.



Company size can also be defined. For example, you may only want to search for Micro and Small companies.

Find and View Suppliers

The filter panel is divided into three sections: Company Size, Levels, and Location. Each section has a title and a list of checkboxes. The Location section includes a search input field and a magnifying glass icon.

- Company Size:** Micro Enterprise, Large Enterprise, Small Enterprise, Medium Enterprise
- Levels:** Covid-19 Responders, Silver, Platinum, Bronze, Gold
- Location:** Area Of Operation, Location (with search input and magnifying glass icon), Office located

As search criteria are entered, the filters are updated in the box to the right so you can keep track of how you have filtered your Suppliers.

The panel has a purple header 'List of applied search filters'. It lists three filters: 'NEW Company Size (3): Medium Enterprise, Small Enterprise, Micro Enterprise', 'Work Categories (1): BUILDING GENERAL', and 'All Suppliers'.

When you have finished filtering your results, select **“Apply New Filters”**. To return to the search results without applying the new criteria, select **“Close Filters”**.

The page shows a back button, the title 'Find Suppliers', and 'Search results (138)'. At the bottom, there is an 'ADD FILTERS' button and a filter dropdown menu showing 'Location (1 filter)' with a downward arrow.

Find and View Suppliers

Supplier Profile

To view a Supplier's profile, select the record from the search results when you have completed your search criteria, or select the Supplier's name in following a 'Find Supplier' search.

At the top of the Supplier's profile page, you will see an overview of the Supplier's information, such as the levels they are currently verified to, their registration number, location and their companies house number. Under "More" it is also possible to add a supplier to a supply chain as well as create a printable view of that supplier's profile.

Summary page

We will now look to give you a bit more of an overview of the Supplier's summary page to help you understand each section.

The screenshot shows the summary page for a supplier named HOMES LTD. At the top, there is a logo and the company name. Below this, there are several tabs: Summary, Compliance, COVID-19, and Risk Analysis. The Summary tab is active. The main content area is titled 'Company overview' and contains the following information: Company size: Micro, Number of employees: 5, Companies House number: N/A, VAT number: N/A, and Turnover: £411,639. Below this, there is a short description of the company's services. At the bottom, there are two sections: 'You & 1 HORNES HOMES LTD' and 'Supply Chains' (0 Active) and 'Segments' (0 Active).

Company Overview

This shows the high-level company information. Including turnover, number of employees, companies house number and VAT number. This page also accommodates a description of that Supplier.

The screenshot shows the company overview page for a supplier. It contains the following information: Company size: Medium, Number of employees: 87, Turnover: £4,443,828, Companies House number: 06186917, and VAT number: 535189725. There is also a short description of the company's history and services.

You and your relationship with a Supplier

This shows whether the Supplier you are looking at is in a supply chain segment for your organisation. It also lists the number of active segments, if for example, that Supplier was working on several projects.

The screenshot shows the relationship page for a supplier named 'You & 1st Industrial & Commercial Services Ltd'. It contains two sections: 'Supply Chains' (1 Active) and 'Segments' (1 Active).

Accomplishments - Levels and Compliance

Where a Supplier has signed up for a level, we show this in the "badges" displayed in both the search results and against that supplier profile.

Wherever a "badge" has the red exclamation icon, this Supplier is not verified.

In the below example, the Supplier has signed up for Gold, though is currently only verified to Silver and not verified to Gold.



Find and View Suppliers

Office Locations

This shows the locations that the Supplier has offices/branches at.



Contact Information

This shows the contacts for that Supplier such as primary contacts in the business as well as a business directory.

Detailed supplier information

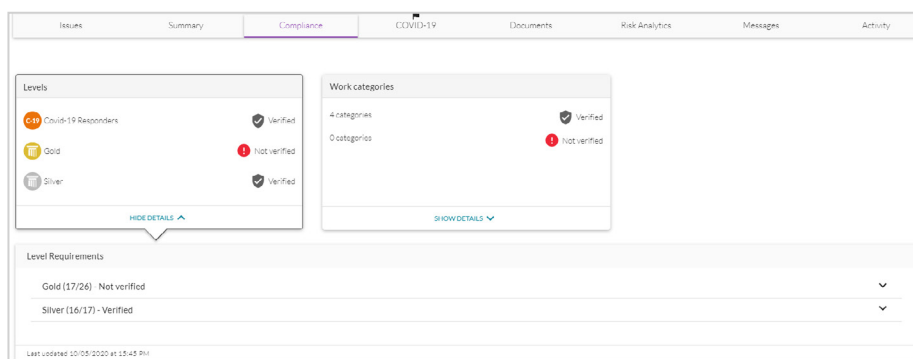
You will also see a number of tabs that will give more information on that particular Supplier. These are as follows:

- **Summary:** This shows the high-level summary information for that Supplier, e.g. contact details, address information etc.
- **Compliance:** This shows the compliance for that Supplier, where they are compliant or not. This is the section from where the question responses can be viewed.
- **COVID-19:** This is the question responses to the COVID-19 question set. Where this has been answered, the tab will have a flag on it.
- **Risk Analytics:** This will show the analytics for that Supplier. You may see this tab if this has been enabled for your organisation.
- **Activity:** This will show the submissions for verification. This is not currently live.

Compliance tab

This shows the compliance for a Supplier, where a Supplier is non-verified, this is where you can see the detail of what is not verified.

To view the details of what has been verified and what hasn't, please select **"Show Details"**. There are currently two parts to this, one for levels and the other for work categories.



Once the section is expanded, it is possible to sort the columns. For example, you can sort column "Status" to show the non-verified sections at the top.

Find and View Suppliers

Levels

- Covid-19 Responders: Verified
- Gold: Not verified
- Silver: Verified

Work categories

- 4 categories: Verified
- 0 categories: Not verified

Level Requirements

Gold (1/26) - Not verified

Requirement	Group	Status	Copy	Last modified	Action
Enhanced Health & Safety	I.3 - Supplementary Questions	Not verified	-	24/01/2020	See responses
Corporate and Social Responsibility	L3 - Supplementary Questions	Not verified	-	24/01/2020	See responses
Environmental Management	O2 - Environmental Management	Not verified	-	11/02/2020	See responses
Quality	O3 - Quality Management	Not verified	-	23/10/2019	See responses

In order to view the question responses, you can select **“See Responses”**. The **“Work Categories”** can also be shown by selecting **“Show details”**. It will be possible to view the detail through selecting **“View”**.

Levels

- Covid-19 Responders: Verified
- Gold: Not verified
- Silver: Verified

Work categories

- 4 categories: Verified
- 0 categories: Not verified

Work Categories

Work Cat	Section	Status	Verified on	Action
BUILDING GENERAL	GENERAL [1 Contractor] BUILDING GENERAL	Verified	14/03/2018	View
BUILDING REFURBISHMENT OVER 15K	GENERAL [1 Contractor] BUILDING GENERAL	Verified	09/03/2018	View
BUILDING (SOCIAL HOUSING)	SECTOR [1 Contractor] BUILDING GENERAL	Verified	14/03/2018	View
CIVIL ENGINEERING	GENERAL [1 Contractor] CIVIL ENGINEERING	Verified	14/03/2018	View

Managing your Supply Chain

How to manage your supply chain in the new platform

Managing your Supply Chain

Supply Chain

Supplier Segments

View Segment	14
Remove Segment	14
Create a New Segment	14
Add Suppliers	14

View Segment

Edit	15
Add Supplier	15
View Supplier	15
Remove	15

Editing or Creating a New Segment

Create a New Segment	15
Edit Name	16
Segment Type	16
Location	16
Description	16
Compliance Policy	16

Shared Segments

Share	16
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Add Suppliers to a Segment

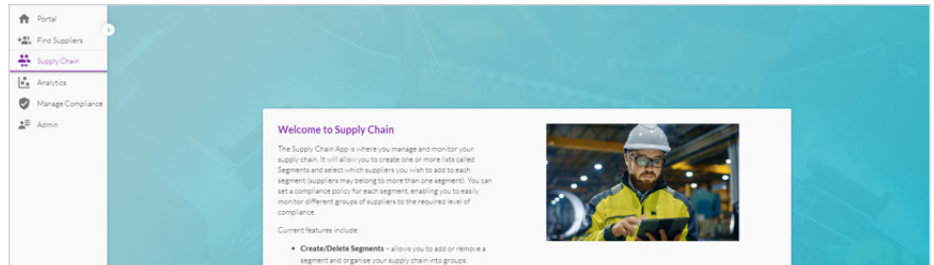
Add Supplier	17
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Managing your Supply Chain

Supply Chain

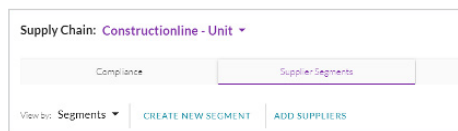
The Supply Chain area is where you can manage your supply chain segments, projects, and other activities you are working on. This is a main configuration area within the new portal and the segments that are created here will appear in analytics as well as in the search filter option.

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
Darfoot city hall refurbishment	05/05/20	Active	20	View Remove

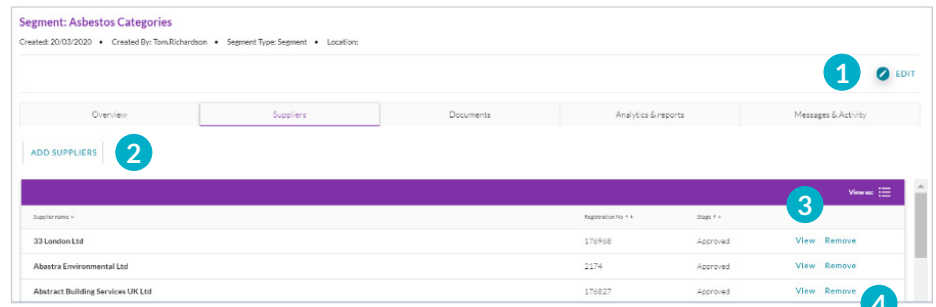
Managing your Supply Chain

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.

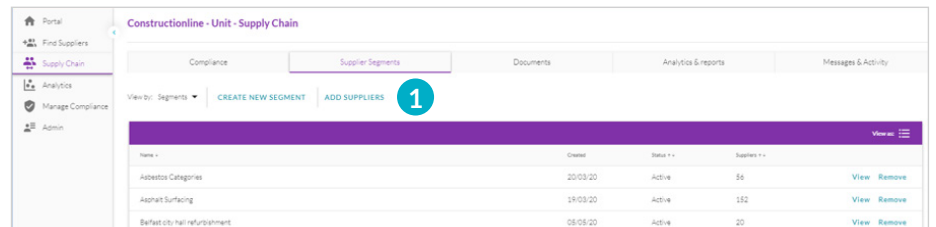
- 1 Edit
- 2 Add Supplier
- 3 View Supplier
- 4 Remove



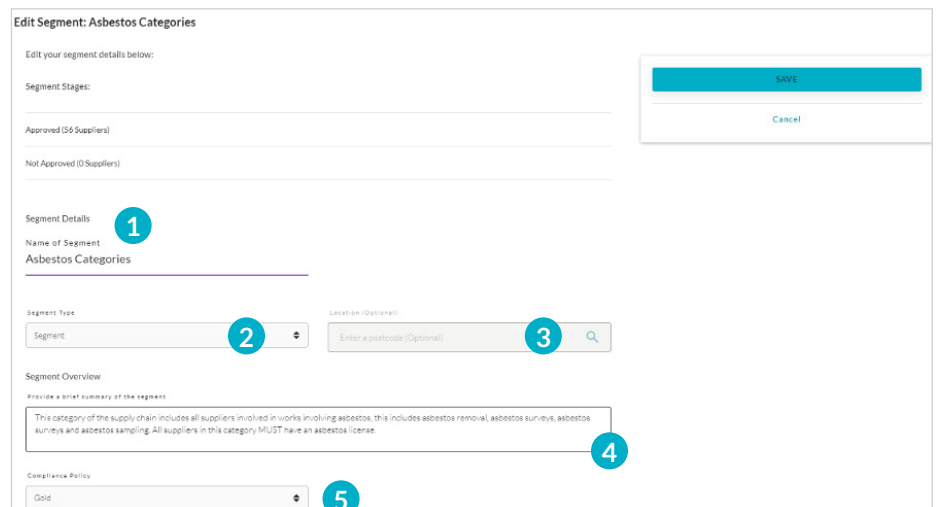
Editing or Creating a New Segment

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



Managing your Supply Chain

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.

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

In order to view business units this has been shared with select “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	
	View Remove
	View Remove

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

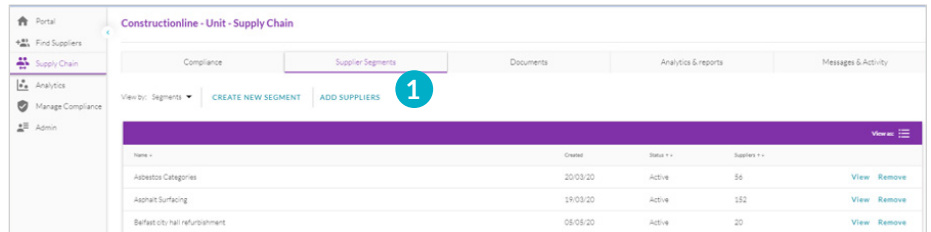
Sharing	
	View

Managing your Supply Chain

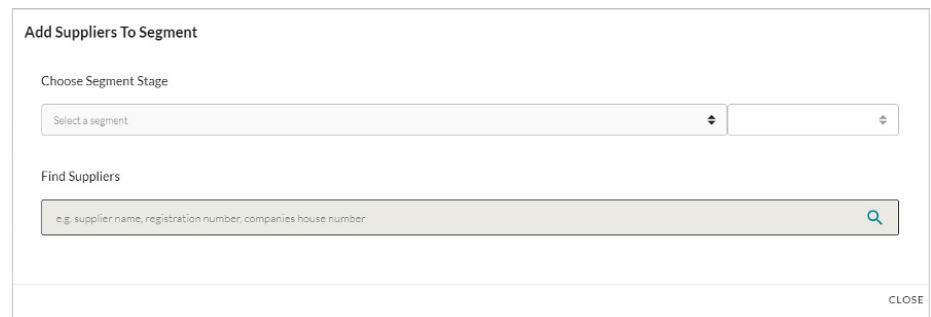
Add Suppliers to a Segment

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 as well as from within search. When doing this within search you can multi select suppliers.

1 Add Supplier



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.



How to use Analytics

How to use Analytics

How to use Analytics

Analytics Areas	20
Available Reports	20

Filters

Organisation Unit	21
Segment Type	21
Segment Name	21
Level	21
Enterprise Size	21

Futher Actions

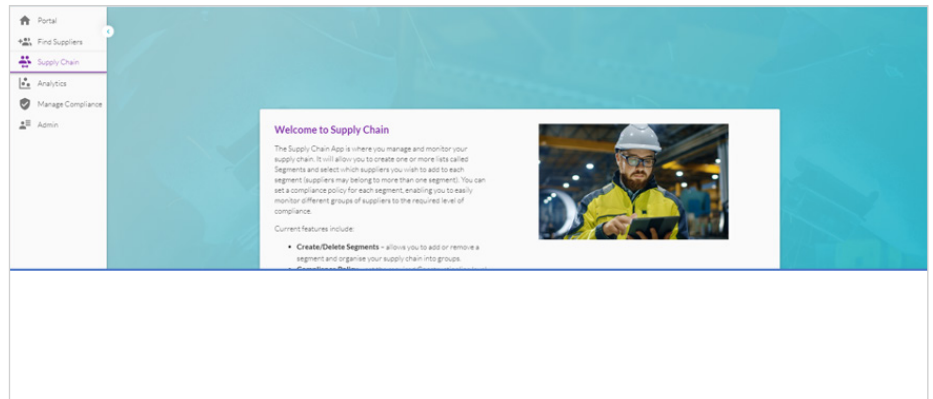
Supplier Profile	22
Export Data	22

We turned this guide into a video too. View it here:

[Constructionline.co.uk/buyer-knowledge-base](https://www.constructionline.co.uk/buyer-knowledge-base)

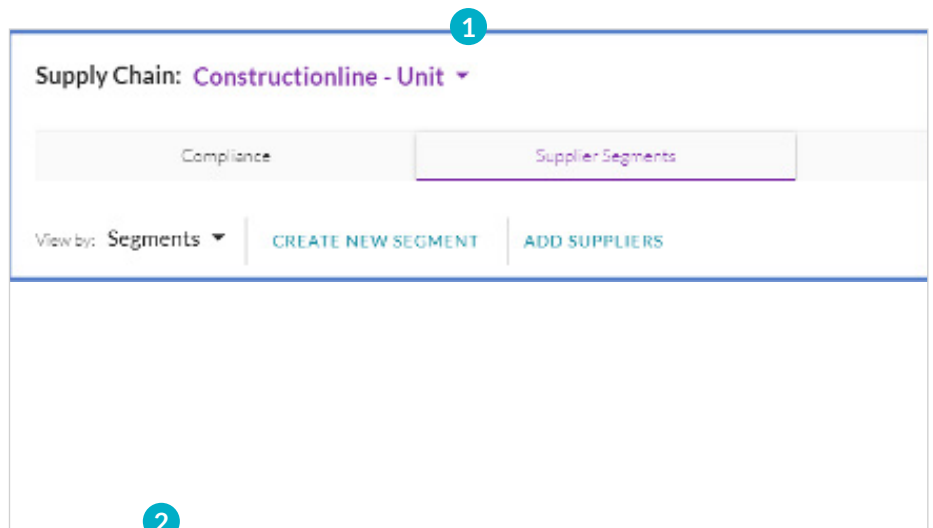
How to use Analytics

Our powerful Analytics application is the area of our platform that combines the data in Constructionline, along with publicly available data, to give you and your business a wide range of insights into your supply chain. To access analytics, you need to select the analytics app on the left-hand side menu. If you do not yet have this application available, please contact us.



Once you are within the analytics app, you will see tabs along the top and along the bottom of the page. The tabs at the top separate out all the various areas that have access to report on, including the supply chain reports and COVID-19 Questionnaire responses. Along the bottom of the page then shows you all the report available within that section.

The example below is a view from the 'Target Subscription level' report which sit in the tab 'Supply chain general analytics'. Other reports within this section include, 'Verification by compliance level and 'Head office geomap'.



- 1 Analytics Areas
- 2 Available Reports

Within each report, you can apply extra filter criteria relevant to your needs. This may be to view a report for a particular business unit, project or to identify which suppliers are verified or non-verified for example. There are two areas that these options appear, the first is at the top of the page as a drop-down menu, the other is shown as a graph on the right-hand side, in the example below.

How to use Analytics

1 Filters

Name	Grant	Status	Suppliers	
Asbestos Categories	20/03/20	Active	56	View Remove
Asphalt Surfacing	19/03/20	Active	152	View Remove
Delft city hall refurbishment	05/05/20	Active	20	View Remove

Filters

The search filters themselves vary with each report.

- 1. Organisation Unit:** The new portal supports a multi-divisional set up. This means that for larger organisations, it is possible to manage the supply chain and report on different divisions e.g. FM, Construction, Rail etc.
- 2. Segment Type:** Supply chain lists in the current portal are being transitioned into segments in the new portal. Segments have a segment type. When creating or managing a segment, it is necessary to define a segment type, this defines the purpose of that particular list be it a segment of your supply chain, project that you are working on or framework.
- 3. Segment Name:** This is the segment itself ('list' in the old portal). This can be used to view the analytics for your suppliers on a particular project or part of your supply chain.
- 4. Level:** This is the membership level that the supplier has signed up for, for example, Bronze, Silver, Gold or Platinum.
- 5. Enterprise Size:** This is the size of the organisation based on turnover and number of employees.

Name	Grant	Status	Suppliers	
Asbestos Categories	20/03/20	Active	56	View Remove
Asphalt Surfacing	19/03/20	Active	152	View Remove
Delft city hall refurbishment	05/05/20	Active	20	View Remove

Where graphs and charts are provided, these can also be used to update the results in the analytics report. This could be used to filter by verification status or based on a particular response to a question. For example, click into Gold on the graph, and your list will update with suppliers with a Gold membership level.

How to use Analytics

Further Actions

Once the search filters have been applied, the list of suppliers shown will be updated. There are further actions that can be taken here:

1

1 Supplier Profile

If you want to view a certain supplier profile, you can select the 'Supplier profile' link to be taken to their profile page.

2

2 Export Data

Hover the cursor on the top right-hand side of any list an ellipsis (three dots). This can be used to export search results in Excel. Select "Export data", from here you can select "Export".

Note: Some of these lists will show more data than is displayed in the frame, where this happens you will see a scroll bar at the bottom of the page.

Standard Analytics

Standard Analytics

Standard Analytics

Supply Chain General Analytics

Target Subscription Level	26
Verification Status by Compliance Level	26
Head Office Geomap	26
By Standard	26
By Requirement	26
Section Status Change	26
Verification Status Expiration	26
Verification Status Expiration by Requirement	26
Insurance Expiration by Type	26
SSIP Expiration	26
Org Unit Comparison	26

COVID-19 Supply Chain & COVID-19 Supply Industry

Overview	27
Financial Challenges	27
Mitigation	27
Suspended Operations	27
Suspended Operations Main Trade	27
Suspended Operations 2	27
Site Operating Procedures	27
Government Assistance 1 & 2	27
Remote Working	27
Supply Chain 1,2 & 3	27

CSR (Corporate Social Responsibility)

Modern Slavery Supply Chain	28
Modern Slavery Policy	28
Diversity Policy	28
Minimum Wage	28
Social Enterprise	28
ISO14001	28
Anti-Bribery and Corruption	28

Project Analysis

Geomap of Supplier Projects	29
Retained Spend by Tier and Distance	29
Compliance by Tier	29

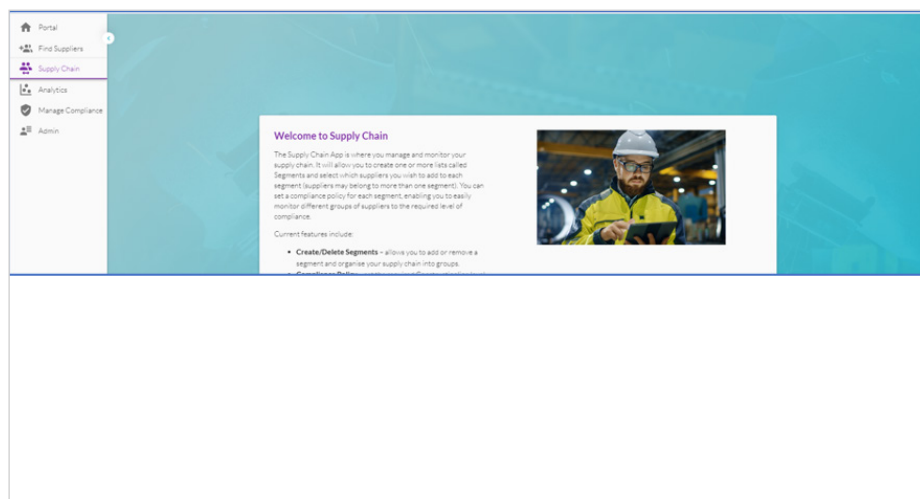
This guide is an overview of the analytics that you will get as standard. There are some more analytics that are not mentioned in this guide, details of these can be found in the **Advanced Analytics** guide.

Our powerful Analytics application is the area of our platform that combines the data in Constructionline, along with publicly available data, to give you and your business a wide range of insights into your supply chain. To access analytics, you need to select the analytics app on the left-hand side menu. If you do not yet have this application available, please contact us.

The areas that this guide will cover are:

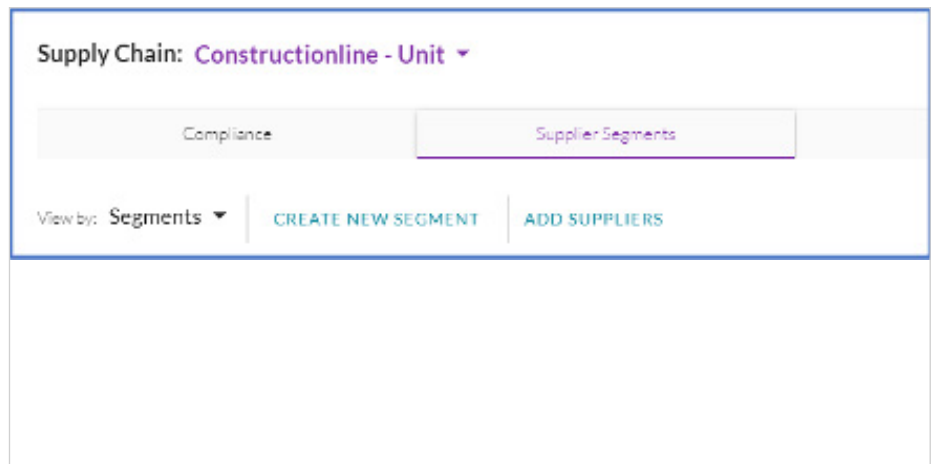
- 1. Supply Chain General Analytics:** This covers the analytics relating to your supply chain and the status of the levels, verification and expiration of the suppliers.
- 2. COVID-19:** This is broken into two parts, the responses to the COVID-19 question set in your supply chain and within the Constructionline platform in general. Analytics in this area covers answers on various questions such as financial impact, site operating procedures and governmental assistance.
- 3. CSR:** This section surfaces answers on key topics within the question set relating to Corporate Social Responsibility, this includes environmental, modern slavery etc.
- 4. Project Analysis:** This shows analysis of projects, this includes details of geo map of suppliers and spend in the local area.

Once you are within the analytics app, you will see tabs along the top and along the bottom of the page. The tabs at the top separate out all the various areas that have access to report on, including the supply chain reports and COVID-19 Questionnaire responses. Along the bottom of the page then shows you all the reports available within that section.



Supply Chain General Analytics

This part of analytics will give an overview of the status of your supply chain or sub-section, depending on the filter criteria applied. This will show you the detail of the supply chain, broken down by subscription level, verification status, location, verification by requirement and standard as well as details on any upcoming expiration.



This part of analytics as the following sections:

- 1. Target Subscription Level:** This shows a breakdown of the supply chain by subscription level, i.e. the level the supplier signed up for. Further filters will show the verification and turnover of the suppliers. Note: The verification status in this section shows the verification for the level that supplier has signed up for e.g. Gold, in some cases these suppliers may be verified to a lower level e.g. Silver.
- 2. Verification Status by Compliance Level:** This shows the verification for each level from Bronze through to platinum. In this report if a supplier is Gold, this report lists them under both the Silver and Gold section, the verification for each will be shown in the relevant section.
- 3. Head Office Geomap:** This report will show on a map, the head office for the suppliers in the selected supply chain.
- 4. By Standard:** This shows the verification for each standard, for example Identity, Financial, Insurances and Health and Safety.
- 5. By Requirement:** This shows the verification for each requirement, for example branch offices, area of operation, director details etc.
- 6. Section Status Change:** This shows the detail of any changes to your supply chain. This information that you would previously have been sent through notifications.
- 7. Verification Status Expiration:** This shows the supplier's upcoming expiration.
- 8. Verification Status Expiration by Requirement:** This shows the supplier's upcoming expiration with the ability to filter by requirement, if for example you want to see whether a particular section is due to expire e.g. insurances.
- 9. Insurance Expiration by Type:** This will show upcoming expiration by type of insurance. This gives the option to filter by type of insurance, e.g. Public Liability Insurance.
- 10. SSIP Expiration:** This will show the upcoming expiration for SSIP. This gives the option to filter by SSIP provider.
- 11. Org Unit Comparison:** This shows comparison across divisions within your organisation, by subscription level and verification. Note: If your organisation does not have multiple divisions, this report will not be applicable.

COVID-19 Supply Chain & COVID-19 Supply Industry

These two parts of analytics show the summary of answers to the COVID-19 question set, both for your supply chain and overall.

The screenshot shows a web interface for 'Constructionline - Unit - Supply Chain'. It features a navigation bar with tabs for 'Compliance', 'Supplier Segments', 'Documents', 'Analytics & reports', and 'Messages & Activity'. Below the navigation, there are options to 'View by: Segments', 'CREATE NEW SEGMENT', and 'ADD SUPPLIERS'. The main content area displays a table with the following data:

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

1. **Overview:** This shows an overview of those organisation that stated whether they were impacted by the COVID-19 outbreak with geomap.
2. **Financial Challenges:** This shows whether the suppliers expect whether they will have significant financial difficulties this year as a result of the outbreak, along with what support they would like from buyers.
3. **Mitigation:** This shows whether suppliers have in place measures to manage the impact of the outbreak along with what measures they put in place.
4. **Suspended Operations:** This shows whether the supplier had suspended their operations, the impact of that suspension and the trades impacted.
5. **Suspended Operations Main Trade:** This shows by main trade, whether suppliers have suspended their operations.
6. **Suspended Operations 2:** This shows the reason for suspension along with the rend over time.
7. **Site Operating Procedures:** This shows those suppliers adopting the site operating procedures.
8. **Government Assistance 1 & 2:** This shows the types of potential support and the supplier's responses.
9. **Remote Working:** Whether suppliers are working remotely and the impact of doing this.
10. **Supply Chain 1,2 & 3:** This shows the suppliers plans to mitigate disruption and adoption of site operation procedures within their own supply chain.

CSR (Corporate Social Responsibility)

This section takes some of the CSR themes and exposes the answers provided by suppliers on them. In this section, both the response is captured along with the verification status of that question. This can be used to identify those suppliers that answered questions in a certain way.

Supplier Name	Registration #	Stage	View	Remove
33 London Ltd	176968	Approved	View	Remove
Alabstra Environmental Ltd	2274	Approved	View	Remove
Abstract Building Services UK Ltd	176827	Approved	View	Remove

- 1. Modern Slavery Supply Chain:** This shows responses to the question “Do you ensure that your supply chain is aware of and abides by modern slavery policy?” and shows verification status.
- 2. Modern Slavery Policy:** This shows responses to the question “Do you have an anti-slavery and human trafficking statement” and shows verification status.
- 3. Diversity Policy:** This shows responses to the question “O1-Q10-2 Making guidance or policy documents concerning how the organisation embeds equality and diversity available to employees/sub-contractors, recognised trade unions or other representative groups of employees?”
- 4. Minimum Wage:** This shows responses to question “Please can you confirm that you pay your staff at least the legal minimum wage?”
- 5. Social Enterprise:** This shows which organisations are categorised as social enterprises.
- 6. ISO14001:** This shows responses to question “O2-Q1 Do you hold a valid BS EN ISO 14001 (or equivalent) issued by a UKAS or equivalent accredited certification body or a valid EMAS certificate?” and verification status.
- 7. Anti-Bribery and Corruption:** This shows responses to question “Do you have an anti-bribery and corruption policy?”

Project Analysis

This section shows analysis on projects including details on spend down the tiers in the supply chain. Much of this part of analytics requires spend data to be included, please talk with your account manager if this is something that you would like to do.

The screenshot shows a web form titled "Edit Segment: Asbestos Categories". At the top left, there is a link "Back to Segment Details". Below the title, it says "Edit your segment details below:". The form is divided into several sections:

- Segment Stages:** This section contains two input fields: "Approved (56 Suppliers)" and "Not Approved (0 Suppliers)".
- Segment Details:** This section includes a "Name of Segment" field with the value "Asbestos Categories". Below it, there are two fields: "Segment Type" with a dropdown menu showing "Segment", and "Location (Optional)" with a search box containing "Enter a postcode (Optional)".
- Segment Overview:** This section has a text area with the following text: "Provide a brief summary of the segment. This category of the supply chain includes all suppliers involved in works involving asbestos, this includes asbestos removal, asbestos surveys, asbestos surveys and asbestos sampling. All suppliers in this category MUST have an asbestos license."
- Compliance Policy:** This section has a dropdown menu showing "Gold".

On the right side of the form, there are two buttons: a blue "Save" button and a grey "Cancel" button.

- 1. Geomap of Supplier Projects:** This shows details of spend in the supply chain for all or selected projects down the tiers. This also shows the retained spend i.e. spend that was retained in the area.
- 2. Retained Spend by Tier and Distance:** This gives a breakdown of the spend, distance and tiers within the supply chain for that project.
- 3. Compliance by Tier:** This shows detail of the verification status down the supply chain tiers for a project.

Advanced Analytics

Advanced Analytics

Advanced Analytics

AI Mined Public Data

Health and Safety	32
Environmental	32

HSE Events

HSE Event History	33
-------------------------	----

HSE Per Supplier Detail

Supplier Detail	33
-----------------------	----

Environmental

Environmental Agency Events Summary	34
Environmental Agency Per Supplier Detail	34

Insolvency

Insolvency Events Summary	35
Insolvency Per Supplier Detail	35

Financial Health

Risk Score	36
Probability of Distress	36
Cash at Risk.....	36

Overview

Overview Summary	36
------------------------	----

Org Comparison

Org Comparison Summary	37
------------------------------	----

Project / Building Comparison

Project/Building Comparison Summary	38
---	----

Project / Building Impact

Project/Building Impact Summary	38
---------------------------------------	----

Risk Radar

Financial Score	39
Probability of Distress	39
Cash at Risk	40
Available through the Supplier's Profile	40
Risk Score History	41

Advanced Analytics

To access Analytics, you need to select the Analytics app on the left-hand side menu. If you do not yet have this application available, [please contact our team](#).

This guide will take you through some of the more advanced analytics on the Constructionline network, including AI mined Public Data and the Financial Analytics.

- 1 AI Mined Public Data
- 2 Financial Health



1. **AI Mined Public Data:** This uses available sources of public information and matches it to your supply chain.
2. **Financial Health:** This uses data from Constructionline in addition to information from Company watch to derive a financial health score and probability of distress percentage on the supply chain.

AI Mined Public Data

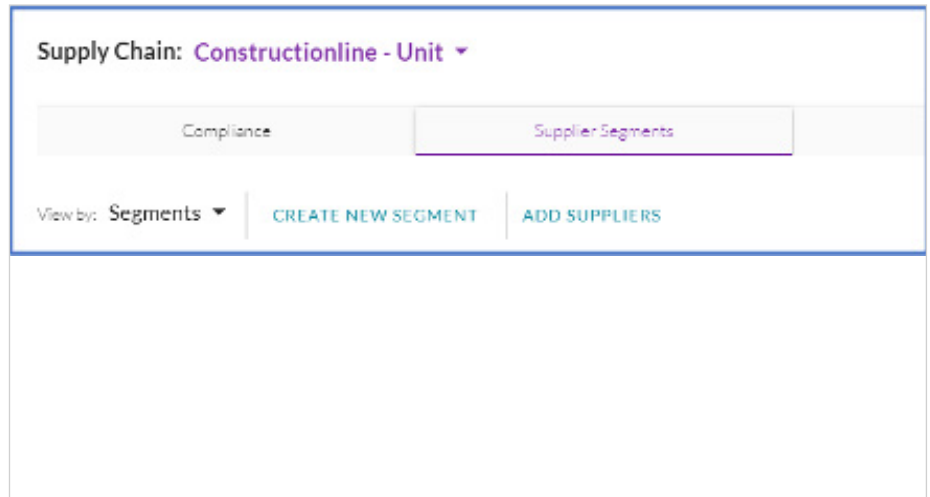
There are two main areas in this section:

1. **Health and Safety:** We use data from the Health and Safety Executive (HSE) website and matches it to data that we have on your supply chain to identify any health and safety incidents within your supply chain.
2. **Environmental:** We use data from the Environment Agency website and match it to data that we have on your supply chain to identify any types of Environment Agency events you may have within your supply chain.

HSE Event History

This shows:

1. The number of HSE events within your supply chain, or subset, depending on the filter criteria applied. The number of events is nearly always higher than the number of suppliers, as some suppliers have multiple HSE events.
2. The number of suppliers that have had a health and safety event will show the number of suppliers for each event type.
3. The associated events. This identifies events that are not directly attributed to an organisation in your supply chain, but they are linked to an event where a director in an organisation in your supply chain previously worked at an organisation which had HSE events.



Note: The graphs, as well as the drop downs, can be used to filter the list of suppliers shown.

HSE per Supplier Detail

These analytics will give some extra detail on the HSE events. By selecting suppliers/subcontractors, you can update the detail. The report also shows the supplier detail along with the incidents they have had. Links on the right-hand side of the page allows users to select the HSE in question to link through to the details in the HSE website.

The screenshot shows a web interface for 'Constructionline - Unit - Supply Chain'. At the top, there are five tabs: 'Compliance', 'Supplier Segments', 'Documents', 'Analytics & reports', and 'Messages & Activity', with 'Supplier Segments' being the active tab. Below the tabs, there is a 'View by: Segments' dropdown menu, followed by two buttons: 'CREATE NEW SEGMENT' and 'ADD SUPPLIERS'. Below this is a table with the following data:

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

Environmental

This report shows the Environment agency events by the number of suppliers and type as well as the total number of events within your supply chain or a selected subset. The graphs can be used as filter criteria along with the drop-down filters at the top of the page.

The screenshot shows a web interface for a segment named 'Asbestos Categories'. It includes a navigation bar with tabs for Overview, Suppliers, Documents, Analytics & reports, and Messages & Activity. Below the navigation is an 'ADD SUPPLIERS' button. The main content is a table with columns for Suppliers, Registrations, and Stage. The table lists three suppliers: 33 London Ltd, Abastra Environmental Ltd, and Abstract Building Services UK Ltd.

Suppliers	Registrations	Stage	View	Remove
33 London Ltd	176968	Approved	View	Remove
Abastra Environmental Ltd	2274	Approved	View	Remove
Abstract Building Services UK Ltd	176827	Approved	View	Remove

Environment agency per supplier detail shows the detail of the suppliers and the individual caution, court cases or enforcements.

The screenshot shows the 'Edit Segment: Asbestos Categories' form. It includes a 'Segment Stages' section with 'Approved (55 Suppliers)' and 'Not Approved (0 Suppliers)'. The 'Segment Details' section includes 'Name of Segment' (Asbestos Categories), 'Segment Type' (Segment), and 'Location (optional)' (Enter a postcode (Optional)). There is a 'Start' button and a 'Cancel' button.

Back to Segment Details

Edit Segment: Asbestos Categories

Edit your segment details below:

Segment Stages:

Approved (55 Suppliers)

Not Approved (0 Suppliers)

Segment Details

Name of Segment
Asbestos Categories

Segment Type
Segment

Location (optional)
Enter a postcode (Optional)

Segment Overview
Provide a brief summary of the segment

Start

Cancel

Insolvency


This shows the details of any insolvency by the supplier as well as the number of events.

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.

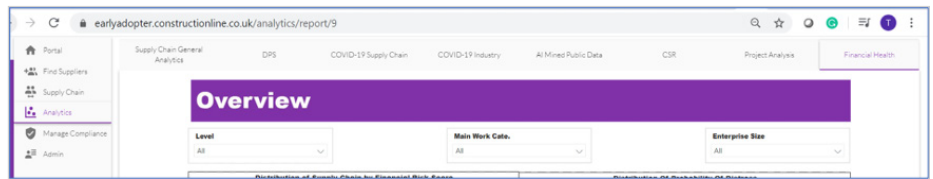
Share this segment with all units within this organisation unit VIEW

Insolvency list by suppliers is available on the next tab.

Sharing	
	View Remove
	View Remove

Financial Health

Navigate to the tab Financial Health within the Analytics app as shown below.



There are a few terms to familiarise yourself within this section:

- 1. Risk Score:** Segmentation to help you focus your efforts on the areas of your business that are most critical. A rating of 1 to 100 corresponds to the highest risk and a rating of 1 the lowest.
- 2. Probability of Distress:** Is the probability that a Distress Event will occur within one year or within three years, expressed as a percentage. A Distress Event could be a failure, reconstruction, or some other event indicative of acute financial distress.
- 3. Cash at Risk:** This uses the health score combined with the committed spend with a supplier to arrive at the impact that any event would have. High spend and high-risk results in a higher cash at risk number. For this to work, details of spend need to be uploaded.

Overview

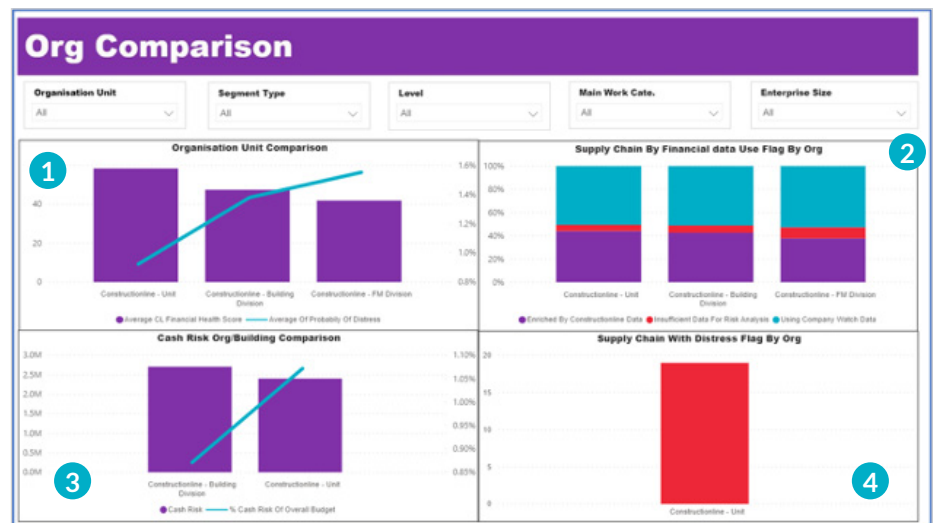
The first tab will show an overview of the supply chain and distribution of the risk scores and probability of distress.

- 1.** The top left-hand side is the distribution of risk score on the supply chain compared to the industry.
- 2.** On the right we show the probability of distress, on here low is good, higher is of more significant concern.

Org Comparison

This page has four sections:

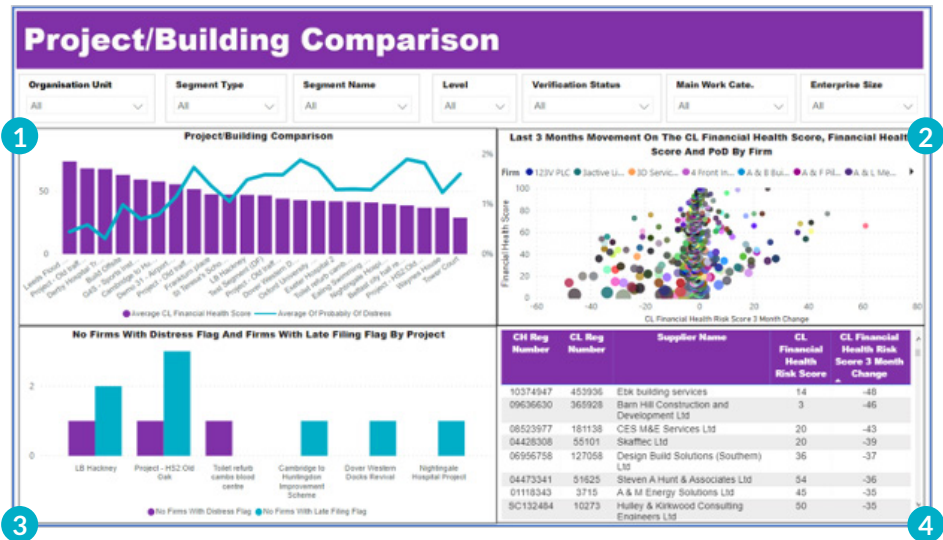
- 1. Top left:** shows the cross-unit comparison of health and probability of distress.
- 2. Top right:** shows where the data comes from, i.e. Construction line, company watch or both.
- 3. Bottom left:** Shows the cash at risk; this is the overvalue x the higher-risk companies. Large order value with high-risk suppliers will show greater risk. This will be further explained in risk radar – cash at risk.
- 4. Bottom right:** is those units with a distress flag.



Project / Building Comparison

This page compares projects, and this will allow you to look across your projects and understand which need the most attention. This has four sections:

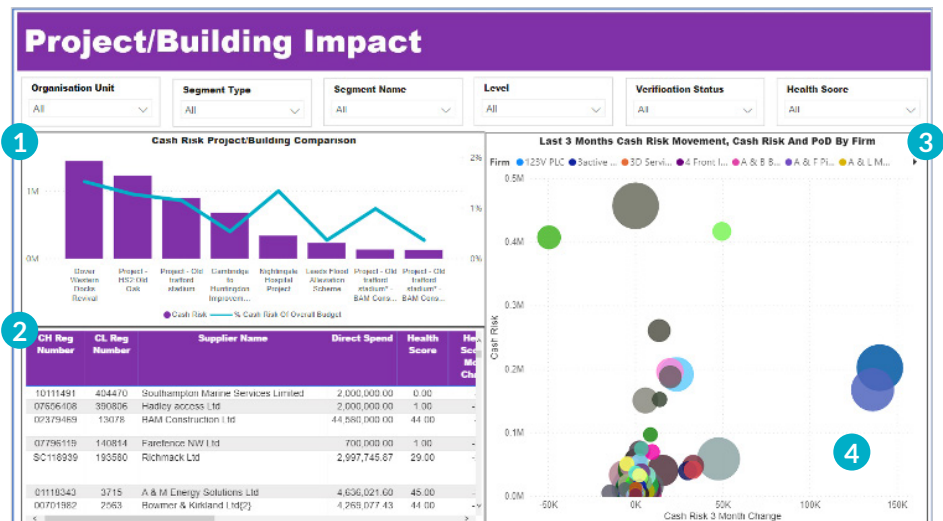
- 1. Top left:** shows the cross-project comparison of health and probability of distress.
- 2. Top right:** shows financial score against the movement in the score. This will be further explained for “Risk Radar – Financial Score”.
- 3. Bottom left:** This shows distress and late filing by the project.
- 4. Bottom right:** bottom right shows the detail of the suppliers their risk score and three months of change.



Project / Building Impact

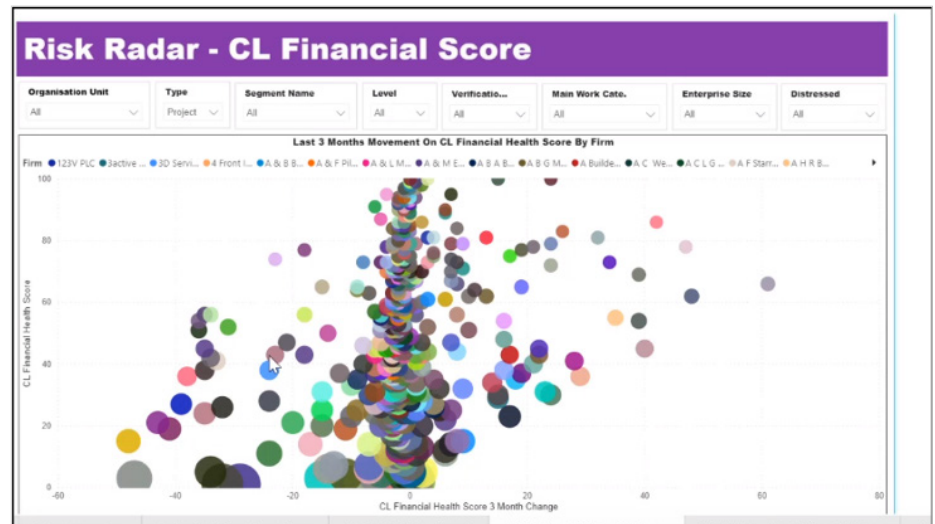
This page shows the cash at risk impact and movement of suppliers.

- 1. Top left:** Shows the cash at risk for individual projects.
- 2. Bottom left:** Updated list of suppliers based on the above chart.
- 3. Right:** This shows the detail of the cash at risk (vertical axis) along with the change in cash at risk (horizontal axis). In this view, the high change on the right is the areas that need to be looked at.



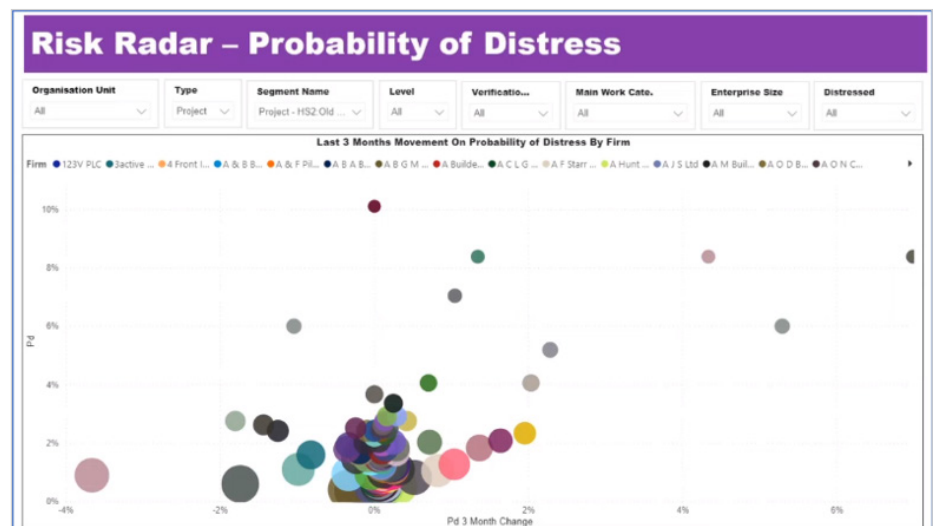
Risk Radar – Financial Score

1. On the vertical axis, we have financial health under 25 is seen as being at risk.
2. On the horizontal axis, we have movement. This is where we are looking at those that are those that have had a negative movement in the last three months, on the left.
3. The bottom left quadrant is where we identify the concern.



Risk Radar – Probability of Distress

This tab is the probability of distress (vertical axis) against the movement in the probability of distress (horizontal axis). The quadrant to keep an eye on here is the high probability and high change. See below.



Risk Radar – Cash at Risk

This is tab is the cash at risk (vertical axis) against the movement in cash at risk (horizontal axis). The quadrants to keep an eye on here are the high movement shown on the right-hand side of the radar.



Risk Analytics – Available through the Supplier’s Profile

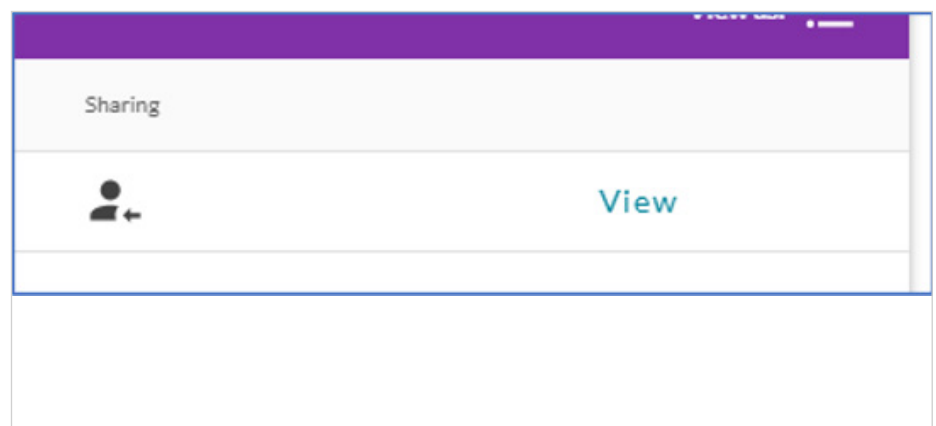
The Risk Analytics tab can be found on an individual supplier’s profile, as highlighted in the image below. This can be accessed by finding a supplier either through the “Find Supplier” or through the “Supply Chain” applications on the left hand navigation.

Financial Risk Model

The first tab is for financial risk.

We take information from Company Watch and enrich it with data from Constructionline, we have found that we have a better likelihood of predicting financial distress. There are a couple of reasons for this:

1. We have full financial accounts irrespective of size, unlike data sources that rely on publicly held information.
2. Often suppliers will submit their accounts to us first as they need this to get their Constructionline verification status.



One of the trends to look for is the movement on the probability of distress. See the above box on the right side. History of movement is also shown on the next tab, see below.

Risk Score History

Name	Created	Status	Suppliers	
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

Further tabs then show details of the filing history, any CCJs, Payment performance issues, HSE and EA issues. Although these can be checked against an individual supplier, not all suppliers will have an issue so it would make sense to view these features through the Analytics App, as this is where this information can be shown by exception, i.e. only those with an HSE issue.

Document Filing Events	CCJ History	Payment Performance	HSE History	Environment Agency History
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Administrator Functionality

How to use the administrator functionality in
the Buyer portal in the new platform

Administrator Functionality

Administrator Functionality

Types of user accounts	44
Creating a new user	44
Deactivating a user	45
Managing user access to divisions within your organisation	45
Managing Permissions	46
Creating Business Units/ Divisions	47

Administrator Functionality

Types of user accounts

To keep your profile secure, we have two levels of user permission available, each with varying levels of access. The table below gives you an overview of these permissions so that you can better understand the level that your users require.

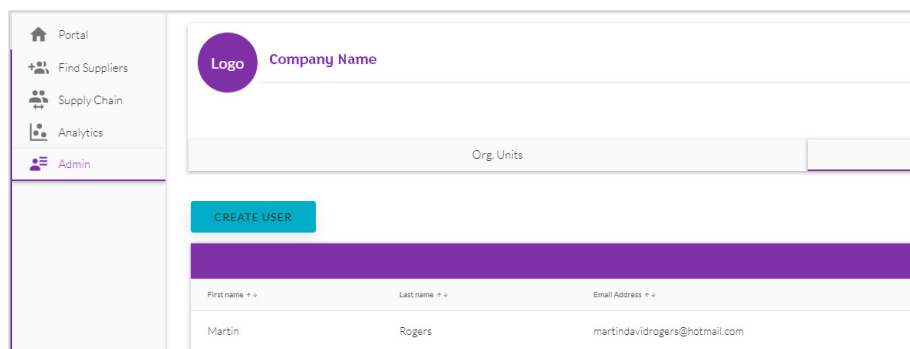
Function	Buyer User	Organisational Administrator
View our new powerful analytics engine	✓	✓
Find and search suppliers	✓	✓
Create and manage segments and projects	✓	✓
Create and deactivate users		✓
Managing the user permissions		✓
Creating business units and divisions		✓

Please note, only Operational Administrators will be able to create new users within your account.

Creating a new user

To create a new user for your organisation, please follow the below steps.

1. Go to the **Admin** option on the left-hand navigation. If you do not have this, please contact your Organisational Administrator.
1. Go to the **User** tab, this can be found on the right-hand side.
1. Select the **Create User** option at the top of the page. See below:



1. Select the first name, last name, e-mail address, the unit that user will be associated with and the level of functionality.

← Back to Organisation: Balfour Beatty

Create user

First Name

Surname

Email address

Organisation Unit

Assign to user groups:
This will assign what level of access users will have.

Buyer Functionality

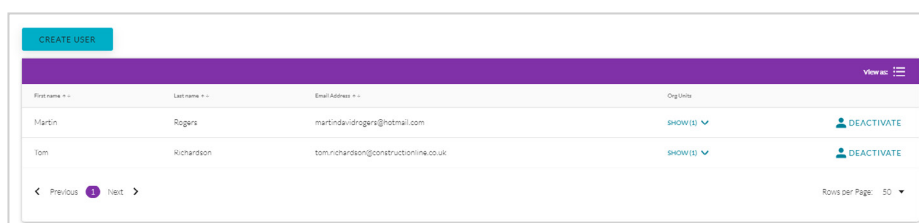
Organisation Administrator

Administrator Functionality

5. Choose their level of access:
 - Select **Buyer Functionality** for day-to-day users
 - Select both **Buyer Functionality** and **Organisational Administrator** for administrators.
1. When finished, select **Create**.
1. The user will then be sent an email asking them to create their password.

Deactivating a user

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
1. Go to the **User** tab (right-hand side).
1. Find the user that needs to have their account deactivated.
1. Select **Deactivate** to the right-hand side.

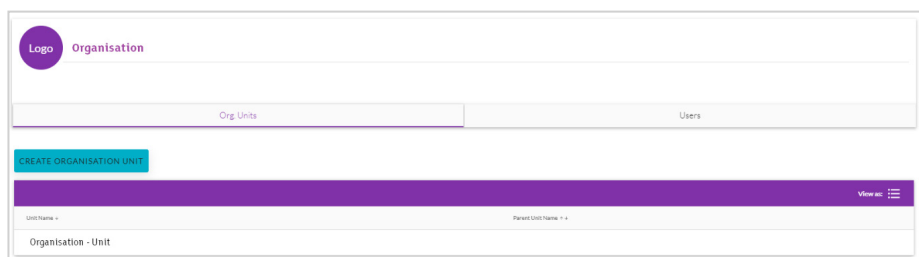


First Name	Last Name	Email Address	Org Units	
Martin	Rogers	martindavidrogers@hotmail.com	SHOW (1)	DEACTIVATE
Tom	Richardson	tom.richardson@constructionline.co.uk	SHOW (1)	DEACTIVATE

Managing user access to divisions within your organisation

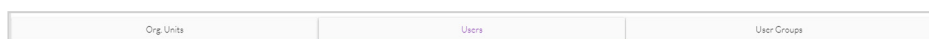
In order to allocate a user to a division or business unit within your organisation, you will need to access the division within the admin area.

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
1. The tab **Org. Units** displays the divisions within the organisation. Select the one for which you want to manage access. This may be just one unit at this stage.



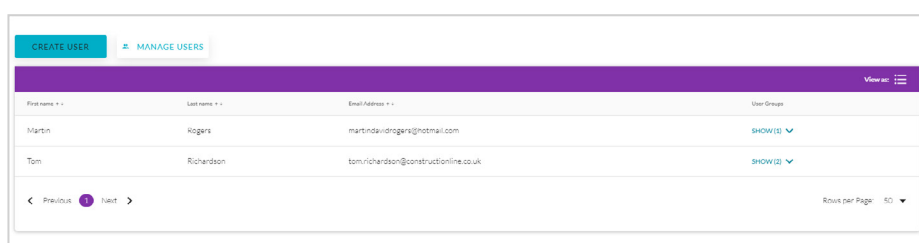
Unit Name	Parent Unit Name
Organisation - Unit	

1. Go to the **Users** tab.



Org Units	Users	User Groups
	Selected	

1. Select **Manage users**.



First Name	Last Name	Email Address	User Groups
Martin	Rogers	martindavidrogers@hotmail.com	SHOW (1)
Tom	Richardson	tom.richardson@constructionline.co.uk	SHOW (1)

Please note: For users that want to change their access from one division to another, you need to make sure that you give yourself access to the division that you need to access first, you should then remove your access to the division that you no longer need to access. You should only have access to the one division now. Log out and log back in again, go to "Supply Chain" to make sure that you are now in the correct division.

1. Tick or untick the users who should, or should not, have access to the business unit.

Manage which users are in: Organisation - Unit

Show: All users in the organisation

<input type="checkbox"/>	Firstname + +	Surname + +	Email Address + +
<input checked="" type="checkbox"/>	Tom	Richardson	tom.richardson@constructionline.co.uk
<input checked="" type="checkbox"/>	Martin	Rogers - Testing Acct	martindavidrogers@hotmail.com

CANCEL CONFIRM

Managing Permissions

In order to allocate/ reallocate user permissions, you will need to access the division within the admin area.

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
1. **Org. Units** displays the divisions within the organisation. Select the unit (there may just be one).

Logo Organisation

Org. Units Users

CREATE ORGANISATION UNIT

Unit Name + + Parent Unit Name + + View all

Organisation - Unit

1. Select **User Groups**.

Org. Units Users User Groups

1. Select **Manage Users** against the permission that you want to manage.

User groups

Allocating users to groups will assign what system permissions they will have.

Buyer	2 users	MANAGE USERS
Organisation Administrator	1 users	MANAGE USERS

1. Select or unselect the users that should have access to that permission.

Manage users assigned to the user Group: Buyer

<input type="checkbox"/>	Firstname	Surname	Email address
<input checked="" type="checkbox"/>	Tom	Richardson	tom.richardson@constructionline.co.uk
<input checked="" type="checkbox"/>	Martin	Rogers - Testing Acct	martindavidrogers@hotmail.com

CANCEL CONFIRM

Administrator Functionality

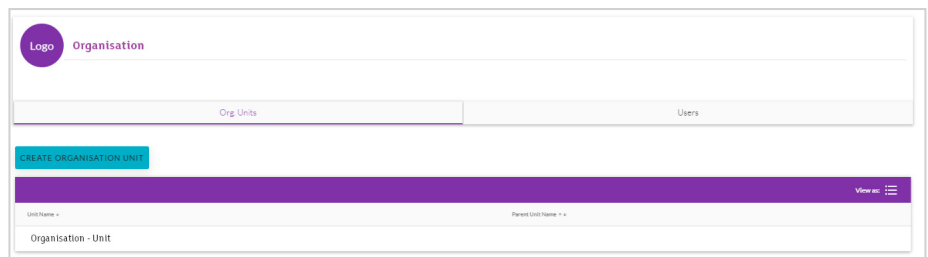
Parent organisations allow a hierarchy to be set up within an organisation. This means that the organisational tiers and sub-tiers can be configured.

Creating Business Units/ Divisions

Within the new buyer portal, multiple organisation units can be set up. As a default, each organisation will be set up with one business unit (defaulted to “Organisation Name” – Unit).

When setting up a unit, you will need to understand what the structure will look like. Are there parent accounts? What is the hierarchy?

1. Go to the admin option on the left-hand navigation. If you do not have this, please contact your administrator.
1. The **Org. Units** tab displays the divisions within the organisation. Make sure you select the level of hierarchy that matches the level of the parent account, if there is no parent account simply select **Create Organisation**.



1. Enter organisation name and the parent organisation unit if one and select **Create**. Make sure that the unit is active.

A screenshot of a form titled 'Create organisation unit'. The form has two main input fields: 'Organisation Unit Name' and 'Parent Organisation Unit'. The 'Parent Organisation Unit' field is a dropdown menu with 'Select...' as the placeholder text. Below these fields, there is a checkbox labeled 'Active' which is checked. At the bottom of the form, there is a blue button labeled 'CREATE'.