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INTRODUCTION

WebReporter – Supplier Analysis

Companies rely on their supply chain to efficiently meet their demands for goods and services. Managing those suppliers to ensure that they are meeting corporate purchasing targets and delivery schedules is critical to the overall success of the company.

The goal of WebReporter – Supplier Analysis, provided by ShipServ, to its valued customers is to provide management and buyers with an up-to-date, accurate information on how their suppliers perform against cost, quality, and timeline goals.
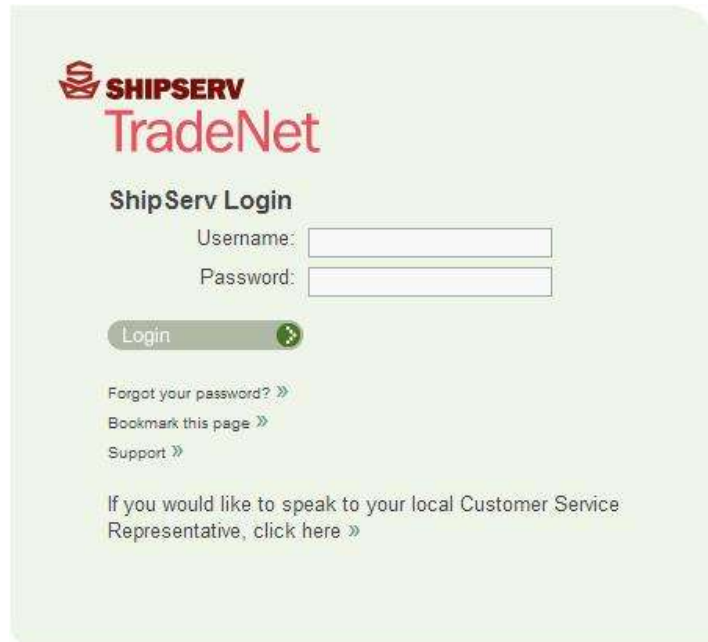
Supplier Evaluation Metrics

This will allow the users of WebReporter – Supplier Analysis to view and select a number of metric of interest out of the available measures displayed in the report. Users will be able to change the metric of interest to drive different types of investigation. Users can investigate how the values of the following measures vary.

- Number of requests sent and responded
- Number or percentage of quote responses
- Number or percentage of accepted, declined requests
- Number or percentage of pending and no reply requests
- Number of quotes awarded for orders
- Number or percentage of pending quotes
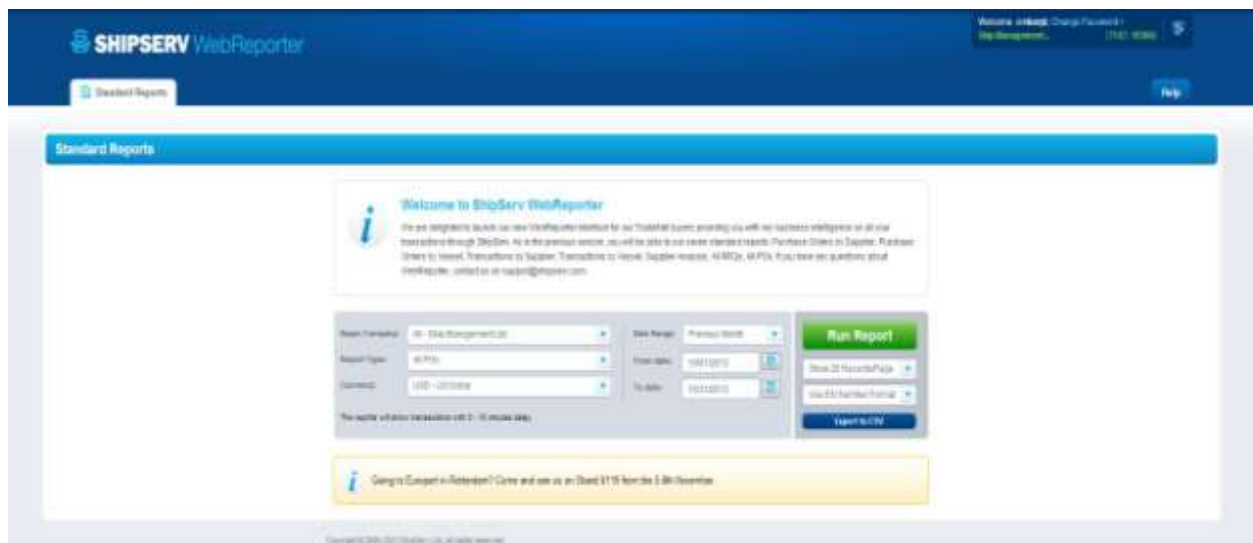- Number of items purchased
- More …

RUNNING THE REPORT

Accessing The WebReporter

Log-in to WebReporter using https://www.shipserv.com/auth/cas/login

Upon logging-in and then the user is redirected to WebReporter – the dashboard should look like this

SHIPSERV
Find. Connect. Trade.

Supplier Analysis Guide

Setting The Parameters

Select the type of **Report** as "**Supplier Analysis**"

Buyer Company:	All - Ship Management Ltd.	▼
Report Type:	All POs	▼
	All POs	
Currency:	All RFQs	
	POs By Supplier	
	POs By Vessel	
The reports will show	Supplier Analysis	
	Transactions By Supplier	
	Transactions By Vessel	

When the type of **Report** selected is "**Supplier Analysis**", the WebReporter dashboard changes to . . .

The **Currency** field is not used in the Supplier Analysis report.

Click the **Show Advanced Options** radio button to enable and manually input on the Supplier Analysis related fields . . .

When a **Date Range** is selected, the following fields are automatically computed . . .

Select the intended **Date Range**

From Date & To Date
(Date format is **MM/DD/YYYY**)

The **From Date** and **To Date** are . . .
∞ The dates used to count for sent or submitted RFQ, QOT, and PO documents.
e.g. *If a RFQ, QOT, or PO is sent beyond this date range, it is not counted in the report.*

The **From Date** and **To Date** can also be manually updated (as **Custom Dates**) for the desired **Date Range**.

The **To Date** must be set on or before the **Report As Of Date**.
The **From Date** should not exceed the **Report As Of Date** and the **To Date**.

This is related to the **Report As Of Date**. For more information, please refer to the **FAQ** section.

Provide the **Report As Of Date**
(Date format is **MM/DD/YYYY**)

The **Report As Of Date** is . . .
∞ The snapshot of the report when this is produced.
*e.g. If the report is run on April 1 for the 1st quarter that has just concluded, you will always get the same result if you set the report period and the **Report As Of Date** the same.*
∞ The reference point for the report in time to count for all RFQ, QOT, and PO responses.
e.g. If a QOT, PO, or POC response is beyond this date, it is not counted in the report.

This is related to the **From Date** and **To Date**. For more information, please refer to the **FAQ** section.

The **Report As Of Date** should not exceed the **latest transaction date** . . .

The **latest transaction date** is the date where we have the most recent data available in the system for reporting; this is typically 5 – 10 minutes delayed. The system has no available data beyond this date.

Provide the **Pending RFQ Cutoff Days**
(Between **0** to **90** days, defaults to **30**)

The **Pending RFQ Cutoff Days** is . . .

∞ The number of days allowed, starting from the RFQ sent date, to wait for a QOT response. In other words, it is the number of days you are willing to wait for the response from the suppliers.

e.g. If the resulting pending RFQ cutoff date is equal or beyond the Report As Of Date, the RFQ is counted as waiting QOT response.

∞ Related to the **RFQ Pending Count** report column

Provide the **Pending PO Cutoff Days**
(Between **0** to **90** days, defaults to **30**)

The **Pending PO Cutoff Days** is . . .

∞ The number of days allowed, starting from the PO sent date, to wait for a POC response. In other words, it is the number of days you are willing to wait for the response from the suppliers

e.g. If the resulting pending PO cutoff date is equal or beyond the Report As Of Date, the PO is counted as waiting POC response.

∞ Related to the **PO Pending Count** report column

Provide the **PO Decision Cutoff Days**
(Between **0** to **90** days, defaults to **45**)

The **PO Decision Cutoff Days** is . . .
       ∞ The number of days allowed, starting from the QOT sent date, to wait for a PO.
       e.g. *If the resulting pending QOT cutoff date is equal or beyond the **Report As Of Date**, the QOT is counted as waiting PO.*
       ∞ Related to the **QOT Pending Count** report column

When setting the **PO Decision Cutoff Days** to zero (0), it will not affect the **QOT Awarded PO %** report column computation.

To Date plus **PO Decision Cutoff Days** should not exceed the **Report As Of Date**.

Run The Report

Click the **Run Report** button.

The report will run and the resulting **Default Summary View** is displayed.
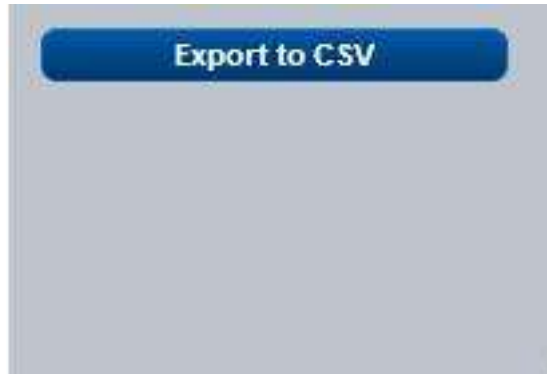
For more information, please refer to the **REPORT METRIC VIEWS** section.

Exporting To CSV (European)

Select the **EU** number format for the **European** numbering and CSV formatting.

Click the **Export To CSV** button.

The resulting **CSV** report file is zipped and can be downloaded into the user's computer and can be opened with MS Excel.
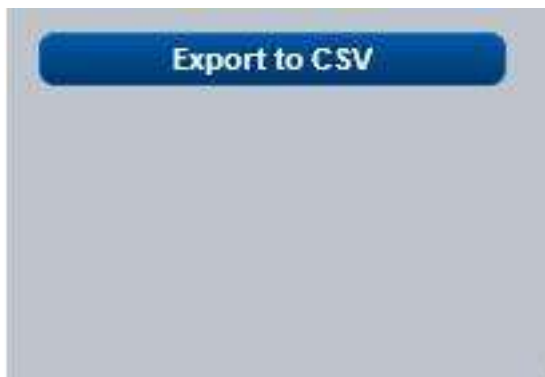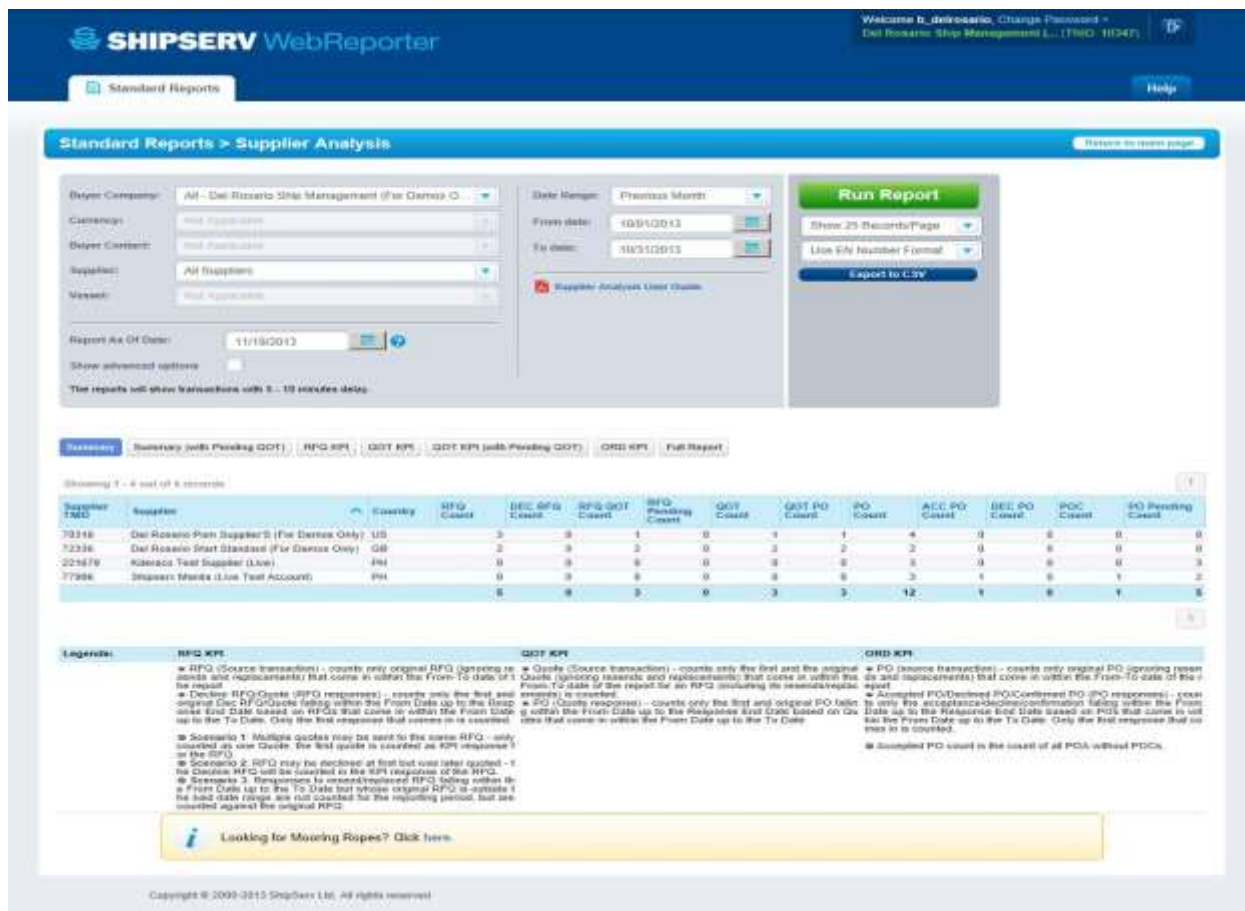
Exporting To CSV (English)

Select the **EN** number format for the **English** numbering and CSV formatting.

Click the **Export To CSV** button.

The resulting **CSV** report file is zipped and can be downloaded into the user's computer and can be opened with MS Excel.

REPORT METRIC VIEWS

The Supplier Analysis report has a number of views, namely:
- ∞ **Default Summary View**
- ∞ **Summary (with Pending QOT) View**
- ∞ **RFQ KPI View**
- ∞ **QOT KPI View**
- ∞ **QOT KPI (with Pending QOT) View**
- ∞ **ORD KPI View**
- ∞ **Full Report View**

Default Summary View

This view has three (3) grouped document related KPI metric views, namely:
- ∞ **RFQ KPI**
- ∞ **QOT KPI**
- ∞ **ORD KPI**

Default Summary View – RFQ KPI Columns

∞ **RFQ Count**

Refers to the number of RFQ documents that were sent or submitted within the **From Date** and **To Date** range.

∞ **DEC RFQ Count**

Refers to the number of declined RFQ documents received on or before **Report As Of Date** out of the **RFQ Count**

∞ **RFQ QOT Count**

Refers to the number of RFQ documents with QOT responses received on or before **Report As Of Date** out of the **RFQ Count**.

∞ **RFQ Pending Count**

Refers to the number of RFQ documents waiting for QOT responses out of the **RFQ Count**. A RFQ document is counted as pending when starting from the RFQ sent date plus the **Pending RFQ Cutoff Days** – the resulting pending RFQ cutoff date is equal or beyond the **Report As Of Date**

Default Summary View – QOT KPI Columns

∞ **QOT Count**

Refers to the number of QOT documents that were sent or submitted within the **From Date** and **To Date** range.

∞ **QOT PO Count**

Refers to the number of QOT documents with PO responses received on or before **Report As Of Date** out of the **QOT Count**.

∞ **QOT Pending Count**

Refers to the number of QOT documents waiting for PO responses out of the **QOT Count**. A QOT document is counted as pending when starting from the QOT sent date plus the **PO Decision Cutoff Days** – the resulting pending QOT cutoff date is equal or beyond the **Report As Of Date**.

Can be seen in **Summary (with Pending QOT) View** and **QOT KPI (with Pending QOT) View**

Default Summary View – ORD KPI Columns

∞ **PO Count**

Refers to the number of PO documents that were sent or submitted within the **From Date** and **To Date** range.

∞ **ACC PO Count**

Refers to the number of accepted PO documents received on or before **Report As Of Date** out of the **PO Count**.

∞ **DEC PO Count**

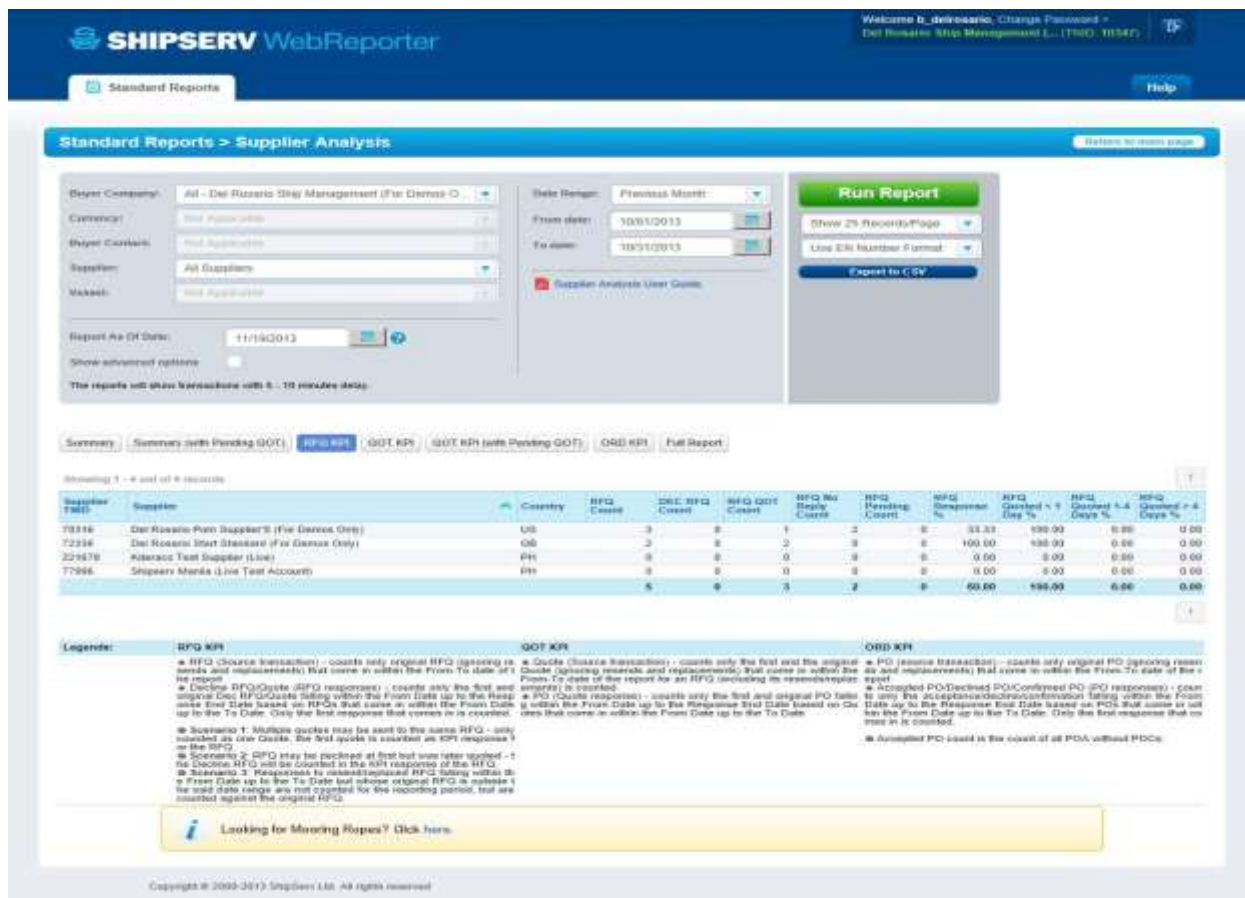Refers to the number of declined PO documents received on or before **Report As Of Date** out of the **PO Count**.

∞ **POC Count**

Refers to the number of confirmed PO documents received on or before **Report As Of Date** out of the **PO Count**.

∞ **PO Pending Count**

Refers to the number of PO documents waiting for PO responses out of the **PO Count**. A PO document is counted as pending when starting from the PO sent date plus the **Pending PO Cutoff Days** – the resulting pending PO cutoff date is equal or beyond the **Report As Of Date**.

RFQ KPI View

It includes the columns already in the **Default Summary View – RFQ KPI** and the following additional columns . . .

∞ **RFQ No Reply Count**

Refers to the number of RFQ documents that did not have QOT responses or whose QOT responses were received beyond the **Report As Of Date**.

∞ **RFQ Response %**

Refers to the total percentage of RFQ documents with QOT responses.

RFQ Response % is the percentage of . . .
(**DEC RFQ Count** + **RFQ QOT Count**) / (**RFQ Count** – **RFQ Pending Count**)

∞ **RFQ Quoted < 1 Day %**

Refers to the number of RFQ documents with QOT responses that were received within the same calendar day as the RFQ sent out.

∞ **RFQ Quoted 1-4 Days %**

Refers to the number of RFQ documents with QOT responses that were received between 1 to 4 calendar days from the RFQ sent out.

∞ **RFQ Quoted > 4 Days %**

Refers to the number of RFQ documents with QOT responses that were received after 4 calendar days from the RFQ sent out.

∞ **Ave RFQ-QOT Process**

This is computed by extracting all **RFQs submitted** within the **From/To Dates**, find their **corresponding QOTs**, and then compute the average differences between the **RFQ Submitted Dates** and **QOT Submitted Dates** (in days).

QOT KPI View
It includes the columns already in **Default Summary View – QOT KPI**

QOT KPI (with Pending QOT) View
It includes the columns already in **Default Summary View – QOT KPI** and the following additional column . . .

∞ **QOT Awarded PO %**

Refers to the total percentage of QOT documents with PO responses.
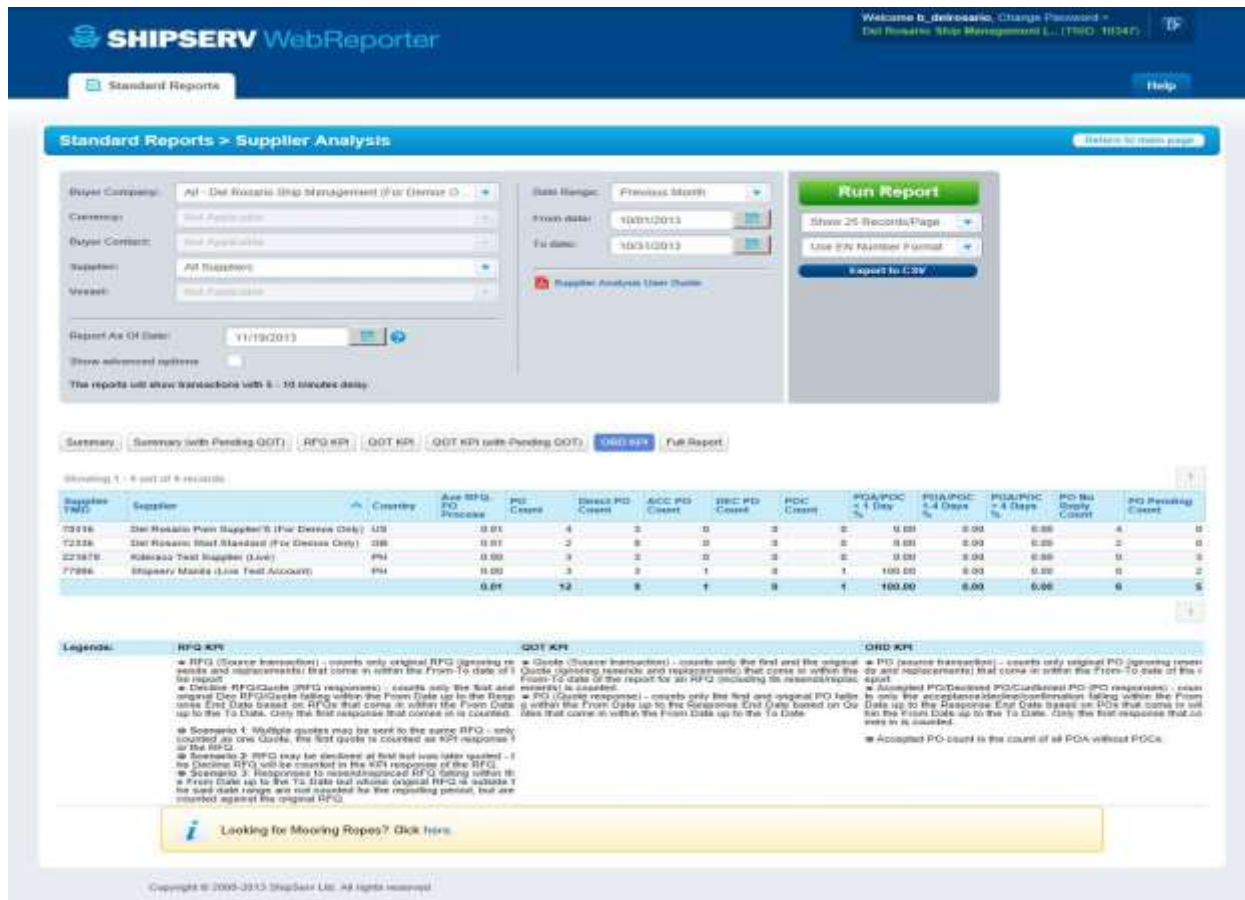
QOT Awarded PO % is the percentage of . . .
QOT PO Count / (**QOT Count** – **QOT Pending Count**)

∞ **Ave QOT-PO Process**

This is computed by extracting all **POs submitted** within the **From/To Dates**, find their **corresponding QOTs** from which they are linked, and then compute the average differences between the **QOT Submitted Dates** and **PO Submitted Dates** (in days).

ORD KPI View

It includes the columns already in the **Default Summary View – ORD KPI** and the following additional columns . . .

∞ **Direct PO Count**

Refers to the number of PO documents sent that did not any QOT.

∞ **PO No Reply Count**

Refers to the number of PO documents that did not have POC responses or whose POC responses were received beyond the **Report As Of Date**.

∞ **POA/POC < 1 Day %**
Refers to the number of PO documents with POC responses that were received within the same calendar day as the PO sent out

∞ POA/POC 1-4 Days %

Refers to the number of PO documents with POC responses that were received between 1 to 4 calendar days from the PO sent out

∞ POA/POC > 4 Days %

Refers to the number of PO documents with POC responses that were received after 4 calendar days from the PO sent out

∞ Ave RFQ-PO Process

Extract all **POs submitted** within the **From/To Dates**, find their **corresponding RFQs** from which they are linked, and then compute the average differences between the **RFQ Submitted Dates** and **PO Submitted Dates** (in days).

∞ Ave RFQ-ACC PO Process

Extract all **POs submitted** within the **From/To Dates**, find their **corresponding RFQs** and **corresponding PO Acceptance/Confirmation responses** from which they are linked, then compute the average differences between the RFQ Submitted dates and **PO Acceptance/Confirmation Response Dates** (in days).

∞ Ave PO-ACC PO Process

This is computed by extracting all **POs submitted** within the **From/To Dates**, find their **corresponding Accepted/Confirmed PO responses** from which they are linked, and then compute the average differences between the **PO Submitted Dates** and **PO Acceptance/Confirmation Response Dates** (in days).

∞ Ave PO- DEC PO Process

This is computed by extracting all **POs submitted** within the **From/To Dates**, find their corresponding **Declined PO responses** from which they are linked, and then compute the average differences between the **PO Submitted Dates** and **PO Declined Response Dates** (in days).

Full Report View

It includes all the columns of the views described above.

FREQUENTLY ASKED QUESTIONS

What is the difference between Report As Of Date and the From/To Dates?

The **Report As Of Date** is used to determine the number of document responses (e.g. QOT, POA, POC), whereas, the **From/To Dates** are used to determine the number of submitted documents, in a particular report.

In **RFQ KPI** related view, we use the **From/To Dates** to count for submitted RFQ documents and use **Report As Of Date** to count for QOT responses – related to the RFQ.

In **QOT KPI** related view, we use the **From/To Dates** to count for submitted QOT documents (these are actually responses to RFQ documents regardless when the RFQ documents were submitted) and use **Report As Of Date** to count for PO responses – related to the QOT.

This is the reason why the **RFQ KPI** – **RFQ QOT Count** is sometimes different, in numbers, compared to the **QOT KPI** – **QOT Count**.

The **RFQ KPI** – **RFQ QOT Count** uses the **Report As Of Date** to get the responses while the **QOT KPI** – **QOT Count** uses the **From/To Dates** to get the submitted documents.

In the same manner, the **QOT KPI** – **QOT PO Count** is also different from the **ORD KPI** – **PO Count**. In **QOT KPI** related view, we use **Report As Of Date** to count for PO responses – related to the QOT.

In **ORD KPI** related view, we use the **From/To Dates** to count for submitted PO documents (these are actually responses to QOT documents regardless when the QOT documents were submitted) and use **Report As Of Date** to count for POC responses – related to the PO.

What are the pending/decision cutoff days?

The pending/decision cutoff days are the following . . .
- ∞ **Pending RFQ Cutoff Days**
- ∞ **Pending PO Cutoff Days**
- ∞ **PO Decision Cutoff Days**

Please refer to steps above for their definitions and allowed values.

As an analogy likened to a company balance sheet . . .

When you run a balance sheet report in your accounting system, it only includes information that was known at the time. So a payment that has not been received is included in Accounts Receivable because at that moment we don't know if the check has come in or not.

*This is similar with **Pending RFQ/QOT/PO Counts** – a response (payment) that has not been received yet is included in the pending count (Accounts Receivable) because at that moment we don't know if the response has come in or not.*

However, if the company has a policy where after 3 months the account is written off then anything more than 3 months old has already been removed from Accounts Receivable. It doesn't matter whether a check eventually comes in later. At that moment, all we know is that anything less than 3 months old is still a receivable, and anything more than 3 months old is a bad debt.

*This is similar with the **Pending/Decision Cutoff Days** – a company has a policy whereby after 60 cutoff days (3 months policy) of waiting for a response (payment) and there is no response (payment), it is removed from pending count (Accounts Receivable) and it is included as a no-reply (Bad Debt). If is still within the cutoff days then it is still included as a pending count.*

An exception to this rule is a response that is received after the cutoff days but still received within the Report As Of Date – it is included as a valid response.