Attachment 3 - Customer's user needs

	Sub area	User needs
1. CATEGORY MANAGEMENT		
1.01	Management of category tree	Need to be able to upload/configure a category tree structure with minimum five levels.
1.02		Need to be able to make changes and updates to the category tree structure when required.
1.03	Overview	Need an overview of status, content, and activity for each procurement category (i.e. aggregated view of in-take, planned and ongoing category management activities, status on-going sourcing processes and contracts, spend, updated risk and savings and value-creation profiles).
1.04		Need to be able to drill-down in procurement categories to find more detail.
1.05	Define, plan, and initiate	Need to be able to define, plan and initiate category management activities.
1.06	Strategy	Need to be able to define category strategies on all levels in the category hierarchy/category tree (category, sourcing group, tender group, product group).
1.07		Need to make approved category strategies available for sourcing, contract and sustainability managers.
1.08	Implementation of strategy	Need to be able to define category implementation activities on the different levels in the category tree.
1.09	Following-up strategy implementation in sourcing processes	Need to follow-up category strategy implementation in sourcing processes.
1.10		Need to follow-up category risk and savings and value-creation actions applicable to sourcing processes.
1.11	Following-up strategy implementation through contract management	Need to follow-up category strategy implementation in the contract management.
1.12		Need to follow-up category risk and savings and value-creation actions applicable to contract management.
2. INTAKE AND PORTFOLIO PLANNING		
2.01	Registration of customer needs	Need to let users from hospital/health trusts register their sourcing needs and root these to the correct procurement category.
2.02		Need to automatically retrieve system-generated needs, i.e.contracts approaching expiry date.
2.03		

	Sub area	User needs
		Need to let users from hospital/health trusts edit registered sourcing needs as required (until formal submission/hand-over has occurred).
2.04 2.05	Processing of registered needs	Need to be able to correct, process and act on registered needs individually or in a list view so as to see all/multiple needs at the same time (both those manually registered and system-generated). Need to be able to get management approval on individual or all registered needs.
2.06 2.07 2.08	Planning and managing	Need to be able to create, maintain and share the annual procurement portfolio plan (1 year plan). Need to make the approved and/or updated procurement portfolio plan available for users from hospital/health trust and visualize relevant changes. Need to make the approved and/or updated procurement portfolio plan available for category-/line and sourcing managers and visualize relevant changes.
2.09 2.10 2.11 2.12	Unplanned acute needs	Need to be able to register unplanned acute needs. Need to see consequences of potential change to the existing procurement portfolio plan (1-year plan) prior to acting. Need to be able to act on unplanned acute needs. Need to inform affected users of changes to the existing procurement portfolio plan (i.e., updated procurement portfolio plan).
2..13 2.14	Resource allocation	Need to be able to plan and optimize resource allocation. Need to be able to allocate a or group of sourcing processes to a sourcing manager.
2.15 2.16	Long-term procurement portfolio plan (4-year plan)	Need to create, maintain, and share a long-term procurement portfolio plan (4-year plan). Need to be able to register larger/long-term needs and have an overview over larger/long-term needs.
3. RISK MANAGEMENT		
3.01 3.02	Category	Need to be able to create category risk profiles pr category and subcategory.

	Sub area	User needs
		Need to be able to monitor risk for the entire procurement portfolio and within each category be able to drill-down to individual sourcing processes or contracts.
3.03	Portfolio planning	Need to be able to do a context analysis (PESTEL-analysis) on proposed sourcing processes to identify the risks and opportunities and use the results to guide/support the organization in the strategic decision-making process.
3.04 3.05	Sourcing	Need to be able to create and update/change risk assessments in sourcing processes based on input from the context analysis. Need to be able to define risk mitigating actions connected to individual risks in the risk assessments for sourcing processes.
3.06		Need to be able to adjust and justify changes to the sourcing plan based on risk assessment and mitigating actions.
3.07 3.08	Contract	Need to be able to create and update/change risk assessments for contracts. Need to be able to define risk mitigating actions connected to individual risks in the risk assessments for contracts.
3.09		Need to be able to adjust and justify changes to the contract management plan based on risk assessment and mitigating actions.
4. SPEND		
4.01 4.02	Category management	Need to have an overview of total spend for each category for a defined period with drill-down functionality. Need to have an overview of total spend on the different levels in the category tree, pr contract and pr category supplier for a defined period with drill-down functionality.
4.03		Need to have an overview of total maverick spend on the different levels in the category tree.
4.04 4.05	Sourcing processes	Need to have an overview of total historic spend based on previous contracts for each sourcing process.

	Sub area	User needs
4.06		Need to have an overview of total historic spend pr product group- and product (in and across contracts) for each sourcing process. Need to have an overview of total historic spend pr health region and pr health trust and each sourcing process.
4.07	Contract management	Need to have an overview of total spend with drill-down functionality pr product/product group for each contract.
4.08		Need to have an overview of total spend measured against the stipulated spend or max spend for contract with drill-down functionality pr product/product group for each contract.
4.09		Need to have an overview on total spend pr customer (health region/health trust) with drill-down functionality pr product/product group for each contract.
4.10	Aggregated reporting	Need to have access to spend tools for the purpose of data analysis, pulling data and provding standard reports.
5. SAVINGS AND VALUE-CREATION		
5.01	Category	Need to identify and define potential savings and value-creation targets on different category levels.
5.02		Need to monitor development on savings and value creation targets in sourcing processes and active contracts pr category.
5.03	Sourcing	Need to define savings and value-creation targets for sourcing processes.
5.04		Need to report on realized and potential savings and value creations results from sourcing project.
5.05		Need to create a follow-up plan for savings and value creation target monitoring and realization for contract phase.
5.06	Contract	Need to follow-up the savings and value creation plan pr contract.
5.07		Need to report on achieved savings and value creation pr contract.
5.08	Reports and dashboards	Need to have an aggregated overview of savings- and value creation results measured against targets.
6. REQUIREMENTS MANAGEMENT		

	Sub area	User needs
6.01	Requirements database	Need to maintain and share an updated requirements database with sourcing managers.
6.02		Need to be able to retrieve requirements from sourcing processes and implement them in the requirements database.
6.03	Requirements in sourcing processes	Need to be able to retrieve standard requirements from the requirements database.
6.04		Need to be able to register and edit requirements digitally.
6.05		Need to receive, compare, and evaluate tenderers answers to requirements digitally.
6.06	Requirements in contract management	Need to follow-up requirements and contractual obligations digitally.
7. SOURCING PROCESSES		
7.01	Preparatory works	Need to plan and prepare sourcing processes digitally.
7.02	Interaction and collaboration	Need to interact and collaborate with internal- and external project participants prior to, during and after the commencement of the sourcing project.
7.03	Running the sourcing project	Need to run and complete all phases of sourcing processes digitally and in accordance with the Norwegian Public Procurement Act.
7.04	Contract award	Need to be able to award contacts.
7.05		Need to be able to award contracts per lot digitally.
7.06		Need to be able to create one contract for all lots awarded to the same supplier digitally.
7.07		Need to be able to award the same lot to multiple suppliers when the sourcing process involves framework agreements.
7.08	Completing the sourcing project	Need to be able to sign a contract digitally or send a contract to be signed digitally either or both internally and externally.
7.09		Need an official sourcing protocol that documents the process, participants, events, and end-result of the sourcing competition.
7.10		Need to be able to slate sourcing and tender content as required.

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7.11		Need to digitally create one or more contracts based on the sourcing result and ensuing contract(s). Digital content should be transferred.
7.12		Need to create internal sourcing reports to convey experience/incidences and achieved savings and value creation.
7.13		Need to transfer selected content from the sourcing process to an internal archive system.
8. CATALOGUE MANGEMENT		
8.01	Pre-award	Need to be able to retrieve a dynamic price form template (pre-award catalogue), potentially with multiple lots, to be used in a single sourcing process.
8.02		Need to be able to create a dynamic price form (pre-award catalogue), potentially with multiple lots, to be used in a single sourcing process.
8.03		Need the dynamic price forms (pre-award catalogue) to be fully editable pr sourcing process.
8.04	Tenders	Tenderers need to be able to register products or services to be offered directly in the price form (pre-award catalogue).
8.05		Tenderers need to be able to export from/import to the system price form (pre-award catalogue) i.e.in a CSV or excel-format.
8.06		Tenderers need to be able to submit offers on one, several or all lots.
8.07	Evaluation	Need to be able to evaluate accumulated cost per lot.
8.08		Need to have different evaluation models to choose from.
8.09		Need to change evaluation model during the sourcing project.
8.10	Post-award	Need to be able to change/enrich the name of products or services before export/synchronization of price form (post-award catalogue) to the article masterdata repository.
8.11		

	Sub area	User needs
		Need to be able to export/synchronize price form (post-award catalogue) per contract to the article masterdata repository.
9. SUPPLIER PORTAL		
9.01	Profile	All potential suppliers need to have free access to public tenders announced by Sykehusinnkjøp and maintain their own company profile in the system.
9.02		Users from the supplier need to have role-based access to tenders i.e., to differentiate between users working on or formally submitting av tender and likewise for supplier contract management.
9.03	Submitting tenders	Need to allow potential suppliers to submit digital and traditional file-based tenders depending on what the sourcing process requires.
9.04		Need to allow all potential suppliers to save and reuse supplier and tender specific content (i.e., certificates).
9.05		Need to have automatic archiving of all submitted/non-submitted tenders (drafts) for suppliers.
9.06		Tenderers need to be able to communicate digitally with sourcing managers during and after sourcing processes.
9.07	Contract management	Suppliers need to be able to manage their own contracts digitally, follow-up plans, points and issues between the parties and be able to initiate change proposals digitally.
9.08		The suppliers contract managers need to be able to communicate digitally with the customers contract managers during and after the contract period.
9.09		Need to have automatic archiving of supplier contracts for suppliers.
9.10	Catalogue management	Suppliers need to be able to manage and maintain product-/service catalogues within their contracts.
9.11	Communication	Need to manage all digital communication with suppliers through the system.
9.12	Version control and logging of communication and changes	Need to log all supplier communication and supplier events/changes to sourcing processes and contracts. All digital interaction between the parties is to be equally accessible to both parties.
10. CONTRACT MANAGEMENT		
10.01	Start of contract	Contract(s) need to be generated based on the results of a sourcing process and signed contracts. Alternatively, the contract can be registered manually.

	Sub area	User needs
10.02	Overview contract portfolio	Contract managers need to see their own contract portfolio upon logging in the system.
10.03		For each contract in overview, contract manager needs to see key issues/content requiring action. Further detail to be provided after opening contract page.
10.04	Select contract management strategy	Need to have an activity plan (active/reactive contract strategies) for each contract that defines follow-up activities over the contract lifetime including the initial implementation of new contracts.
10.05		Need to be able to register and follow-up standard contract parameters such as contract extension options and price adjustment clauses.
10.06	Digital dialogue	Need to communicate digitally with suppliers within each contract, to avoid user/individual dependency.
10.07		Need to digitally request approvals and/or formal signatures from the health trust and supplier on occurrence as adjustment, deviations, sanctions, compensations, and complaints on each contract.
10.08	Uploading of external content	In addition to the formal contract documents and digital dialog with supplier through the system, the contract manage needs to be able to upload letters, communication (e-mail) and other relevant documents that comes outside the system.
10.09	Proactive contract management	Proactive contract management is about active follow-up and anticipating issues to prevent them from happening. Contract managers need to follow-up contracts and suppliers that are defined as critical for the health trust.
10.10		Need to be able to register and follow-up milestones in contracts (example: milestones that triggers payment, important delivery dates, warranty dates, etc..)
10.11		Need to be able to register and follow-up savings- value-creation, sustainability and other contractually specific follow-up points and options.
10.12	Reactive contract management	Reactive management is all about reacting to contract issues as they arise. Users need to be able to register deviations and complaints on each contract which are managed by the contract manager.
10.13		Need to be able to handle adjustments to product catalogues (price files) including supplier recalls/cancelation of products/services.

	Sub area	User needs
10.14	Multiple framework agreements where mini-competition is used for awarding call-offs	Need to handle mini-competitions digitally that are used for awarding call-offs and handle call-offs with cascading order of suppliers.
10.15	External contract overview and internal contract messaging system	Need to make contracts available for users (clinical personnel) outside of Sykehusinnkjøp (as a purchasing central) so that they can find contracts, order through their own systems, but be able to submit complaints, deviations and other feedback related to a specific contract. Complaints, deviations, and other feedback are to be handled by contract managers.
10.16	Expiry of contracts	Need to generate contract performance report (CPR). The CPR is a document that summarizes contract and supplier performance, what has been delivered, value of deliveries, quality of deliveries (timeliness, change in unit costs and product quality assessments), issues that arose during contract period and how these where resolved.
11. SUPPLIER RELATION MANAGEMENT AND SUSTAINABILITY		
11.01	Dashboard	Need to have overview of all contract suppliers and tenderers with drill-down functionality.
11.02		Need to be made aware of news and incidents in the media regarding contractor suppliers and tenderers participating in on-going sourcing processes (i.e., bankruptcies, corruption, scandals, acquisitions, changes to supply chains etc.)
11.03	Management of supplier relationships	Need to be able to manage supplier relationships on an aggregate level.
11.04	KPIs	Need to have KPIs for each contract supplier.
11.05		Need overview of interactions with every supplier (contracts, as subcontractor, which sourcing processes they have participated in).
11.06	Carbon accounting	Need carbon accounting for supplier.
11.07	The Transparency Act	Need to follow-up suppliers with regard to the Norwegian Transparency Act.
11.08	ESG-requirements within sourcing processes	Need to ensure that ESG-requirements are included and fulfilled in sourcing processes.
11.09	ESG-requirements within contract management	Need to make sure that ESG-requirements are followed-up in contract management.
11.10	CSRD reporting	Need to able to produce Corporate Sustainability Reporting Directive (CSRD) report pr legal entity.
12. CUSTOMERS REQUIREMENTS TO SYKEHUSINNKJØP AS A CENTRAL /GROUP PURCHASING BODY/ORGANISATION (NB! SOME OF REQUIREMENTS MAY BE REPETITIONS)		
12.01	Category management	Need to actively participate in all aspects of category management. Participation pr category.
12.02	In-take and portfolio planning	Need to be able to register own procurement needs.

	Sub area	User needs
		Need to actively participate in portfolio planning by prioritizing our/joint sourcing needs and resource allocation from health regions and health trusts to sourcing processes to start in near future.
12.03	Risk management	Need to view risk assessments for sourcing processes and contracts with a focus on managing the actions health regions and health trusts are responsible for.
12.04	Spend	Need to see own spend data related to own contracts.
12.05	Savings and value creation	Need to be able to report om realized savings and value creation in contract period.
12.06	Requirements management	Need to participate in requirements management. Participation will be on a category/subcategory level or on a subject-matter level.
12.07	Sourcing process	Need to actively participate in sourcing processes. Participation pr sourcing process and on management level (budget, approvals, signing of selected contracts).
12.08	Catalogue management	Need to actively participate in content and structure in product catalogues prior to sourcing competitions.
12.09	Contract management	Need to find valid contracts provided by purchasing central. This includes the signed agreements, digital content and contract manager at the purchasing central.
12.10	SRM and ESG	Need to be able to provide customers with information/reports on sustainability performance and challenges in the services /agreements delivered.