Secure Source to Pay (SS2P)

Sourcing – Administration

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Contents

Overview

This document describes the roles, tasks and, activities a system Administrator can perform in the web3 Admin Center.

The administration functionality allows:

- Access to the Admin Center
- Creation and Management of Entities and Users
- Creation and Management of Tags structure (eSourcing system Taxonomies)
- Exchange Rates: creation and maintenance
- Quick Quote Business Rules: creation and maintenance.

Note: You can grant Access to the Admin Center application to any defined user.

Access the Admin Center

To access the Admin Centre application:

1. Click the **Application** dropdown at the top right corner of your dashboard.
2. Select **Admin Center**.

Side Navigation

The side bar navigation options are summarized below and allow the following activities:

- **Companies**: Search, Create, Delete, and Edit Company profiles.
- **Branches**: Search, Create, Delete, and Edit Company Branch profiles.
- **Users**: Search, Create, Delete, and Edit User profiles.
- **Groups**: Search, Create, and Edit User Groups.

Note: This function option may be disabled.

- **Tag Manager**: Create, Delete and Edit Tags, Root Folders, and Sub-folders.

To search for a Supplier

There are a number of navigation routes to access the supplier profile on the system. The navigation route described below allows access to the supplier details using the search functionality.

1. In the expanded menu on the left side of the screen, click the **Search** button
2. Select the **Search by** criteria from the dropdown list.
3. Type the name of the supplier.
4. Click the **Search** button.
5. To clear the returned listing click **Search** within the side bar options.

Supplier Account Maintenance

The screen below shows the overview page once a supplier company is selected from the default listing or by means of using the **Search** mechanism.

You can complete the following supplier maintenance activities:

- **Company Details**: You can edit core company details.
- **Addresses**: You can create, assign, edit, and delete company addresses.
- **Departments**: You can create, assign, edit, and delete company departments.

* **Branches:** You can create, assign, edit, and delete company branches.
* **Users**: You can create, edit, delete, and assign roles for users.
* **Trading Partners**: You can create, assign, edit, and delete company trading partners.
* **Distributors**: You can create, assign, edit, and delete company distributors.
* **Tags**: You can associate or remove tags with a Company.

Company Details

The company details consist of the information you must provide for the creation of a supplier entity. You can associate users to this entity, give access to the web3 sourcing module, and respond to sourcing projects.

The activities required are:

* **New Company**: Create a new company profile
* **Edit Company Details**: Edit and update the company details profile

To create a new Company:

1. Click the **Companies** tab.
2. Click the **Create New Company** button.
3. Type the company name in the **Company Name** field (mandatory).
4. Complete the rest of the details (optional).
5. Click the **Save** button.

To edit Company details:
1. Select the **Company** you want to edit.
2. Click the **Edit** button.
3. Modify company details as required.
4. Click the **Save** button or the **Cancel** button.

Users

To allow access to the web3 Sourcing module, you must create user profiles and associate them with the relevant company. The web3 Sourcing roles assigned to users of either **Vendor** or **Buying** type dictate which responsibilities they are allowed to perform.

Role Name	Buying/Vendor	Description
Sourcing Supplier	Vendor	Vendor company sourcing role which allows the vendor company to be invited to, and respond to, sourcing projects – RFx and Auctions.
Sourcing User	Buying	Buying company sourcing base role which allows the creation, editing, and management of the users own projects and visibility of those projects where they are included in the team.
Sourcing Auction Monitors	Buying	Buying company role specifically to allow the viewing only of Auction projects they are included in the team for.

Sourcing Superuser	Buying	Buying company sourcing base role which allows the creation, editing and management of the all projects. The Superuser has other editing rights not permitted to the base sourcing user role.

Create a New User

1. Select a company you want to associate the user is and click the **Users** tab.
2. Click the **Create New User** or **Add Existing User** button.
3. Complete the relevant fields. Fields marked with an asterisk (*) are mandatory.
4. Click the **Save** button or **Cancel** button.

Complete and Edit User Profile

1. Navigate to a user maintenance overview screen.
2. Complete/Edit the relevant User details (contact details - optional, roles – required)

Add/Change User Details

1. Select a User to amend.
2. Click the **Contact Details** tab.
3. Click the **Edit** button.
4. Update the required fields.
5. Click the **OK** button to save, or the **Cancel** button to cancel changes.

Assign User Roles

1. Select a user you want to assign a Role to.
2. Click the **Roles** tab.
3. Check the appropriate role.
4. Click the **Save** button.

Edit User's Profile

1. Select **Users** from the side bar menu.
2. Search for the user.
3. Select the user. Click the **Edit** button.
4. Make the necessary changes and click **Save**.

Tags and Categories

You can use tags and categories to allocate suppliers to enable users to filter the type of suppliers they have in their database.

You can assign categories as follows:

- **Buyers**: You can assign multiple tags.
- **Suppliers**: You can assign the supplier's company tags and categories; all the users for that company use the same set of categories. This can be as part of the self-registration process or as part of the supplier set up by the Sourcing administrator and/or Supplier approval process.

- **Folders**: You can assign tags, any projects and Negotiations stored under that folder inherit the folders tags.
- **Projects**: Tags are inherited from the folder, but you can modify. All Negotiations in the project inherit the projects tags.
- **Events**: Tags are inherited from the project folder, but you can modify and add additional tags.

Note: Category taxonomies are configurable.

The following activities are allowed:

- **Root Level Folder**: Create, edit, move, and add a sub-folder and tags.
- **Sub-folder**: Create, edit, and move.
- **Tags**: Create, edit, and move.

Tag Manager Screen

Select the **Tag Management** option on the left-hand side navigation menu.

Create Root Level Folder

1. Click the **Add Root Level Folder** button.
2. Enter the **Folder Name**.
3. Click the **Save** button or **Cancel** button to cancel the action.

Folders

Edit Folder Name

1. Select the folder name you wish to edit.
2. Change the **Folder Name**.
3. Click the **Save** button to apply the changes or the **Cancel** button to cancel the changes.

Delete Folder

1. Select the folder you wish to delete.
2. Click the **Delete** button.
3. Click the **Save** button to confirm deletion or the **Cancel** button to cancel deletion.

Add Sub-folder

1. Select the folder you wish to add a sub-folder to.
2. Enter the **Folder Name**.
3. Click the **Save** button to create the sub-folder or the **Cancel** button to cancel the creation.

Move Folder

1. Select the folder you wish to move to another location.
2. Click the **Move** button.
3. Select the destination folder from the listing.
4. Click the **Save** button.

Create and Assign a Tag

To create and assign a tag to a folder:

1. Select the folder you wish to add a tag to.
2. Click the **Add Tag** button.
3. Enter the **Tag Name** and **Code** (not mandatory).
4. Click the **Save** button.

Note: You must assign a tag to either a **Root Level Folder** or **Sub Folder**.

Supplier Tagging

Click the **Tag Assignment** option on the left-hand side navigation menu. Admin Users can search for suppliers based on Name, Operating Country, or an already existing Tag. Admin Users can assign a tag or bulk assign tags to the selected suppliers, making it easier for the team members to search for or report on relevant suppliers in the future.