Secure Source to Pay (SS2P)

Sourcing – Dashboard

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Application Layout

The **Dashboard** is the landing page for users accessing Secure Source to Pay and is configured to be pertinent to them based on their roles. The Dashboard is designed to provide useful summary information and alerts to users for actions they need to perform. The dashboard presentation provides single click navigation for these important activities.

In addition, users can access all areas of Secure Source-to-Pay available to their role from the menu items on the left hand side of the application. The options available on the menu are role specific. Users cannot see options their role does not permit.

Dashboard

The following navigational elements are available within the Dashboard:

1. **Application Navigation Bar**: Located in the upper right corner of the solution, the Application Navigation Bar provides access to navigation and setting features.
   - **Application** provides seamless navigation between modules (permissions based).
   - **Language** allows you to set your preferred language.
   - **Home** provides access to the main homepage.
   - **Sign Out** logs you out of the system and returns to the Login Page.

2. **Vertical Navigation Bar Menu**: Located on the left-hand side of all pages within the solution, the vertical navigation menu contains a list of links to the main tasks which can be performed in the application.
   - **Dashboard**: Navigates to the main screen.
   - **Negotiations**: Navigates to the top level folder overview.
   - **Supplier History**: Provides access to a summary listing of all suppliers within the database with their eRFx and Auction participation summary, including the ability to view their responses.
   - **Review**: Lists events to review.
   - **Awarding**: Provides access to a summary listing of all closed negotiations. You can access negotiations to complete award process.
   - **Activity Calendar**: Provides access to a calendar that shows the activity of any chosen supplier or buyer.
   - **Question Library:** Provides access to the library of questions created by a buying organization. These questions can be applied to future negotiations.
   - **My Email Templates**: Displays the list of system-generated emails customized by the user.
   - **Reminders**: Lists all reminders in three tabs: future, current and expired.
   - **SIM Dashboard**: Captures and displays supplier organization information, such as address, key contacts, event history, etc.
   - **Modify Content**: Lists the quick links and widgets available to add to the customizable dashboard.
3. **Dashboard Content Area**: Contains information and controls that make up a particular page of the application.

Configuring your Dashboard

Working within the dashboard content area, you can personalize the layout of the Dashboard according to your needs and preferences.

- **Quick Links** provide access to sourcing functions used to initiate a **Negotiation.** Quick links are fixed and can be named according to client requirements.
- **Widget** content areas are pre-determined and can be personalized and repositioned. Click/hold and drag/drop to move the widget
- The Collapse/Expand Icon ▲ is used to manage content panes displays. Click to Collapse or Expand content panes.
- The **Close** icon ⊗ is used to close a specific content pane.

Additional Dashboard Configuration:

You can choose the content widgets you want displayed on your dashboard home page. To change the widgets displayed:

1. Click the **Modify Content** link to access the content display options.
2. Select/Deselect the checkboxes to **Show** or **Hide** the content widget on the dashboard.
3. Click **Save Changes** to save. Click **Cancel** to cancel your changes.
4. You can restore the dashboard to the default display by clicking **Restore Standard Dashboard** button.

Dashboard Widgets

Event Status

The **Event Status** widget provides access to and displays the status of the different sourcing types. The **Event Status** widget is permissions based so you will see all authorized activity based on your assigned role.

Event Management

The **Event Management** widget displays sourcing activities that require you to review or action. For example, this can be a list of published negotiations requiring review or those awaiting approval.

Event Summary

The **Event Summary** widget displays ongoing activities. From here, you can navigate to open any negotiation to review its status without having to go through the folder structure.

Quick Browse

Quick Browse is a folder and project structure that allows you to quickly navigate through all folders and negotiations you have access to. It is managed in the same way you would manage and maintain folders on your desktop. Folders, subfolders, projects, and negotiations can be structured and maintained in such a way that you can easily find activities on the system.

To navigate **Quick Browse,** follow the instructions below:

1. Select **Hide old events** to remove archive events from the content tree listing.
2. Click **[+]** to expand content tree. Click **[-]** to collapse content tree.
3. Click **Project** or **Negotiation link** to view project or negotiation.

Involvement Calendar

The **Involvement Calendar** lists all ongoing and upcoming events in a calendar format.

Reminders

Reminders can be set to remind users of activities and actions they are required to perform. Events are grouped into **Today's Reminders** and **Other Reminders**. Other reminders include **Future** and **Expired**. Clicking each group link opens the reminders screen and allows you to navigate to the appropriate tab.