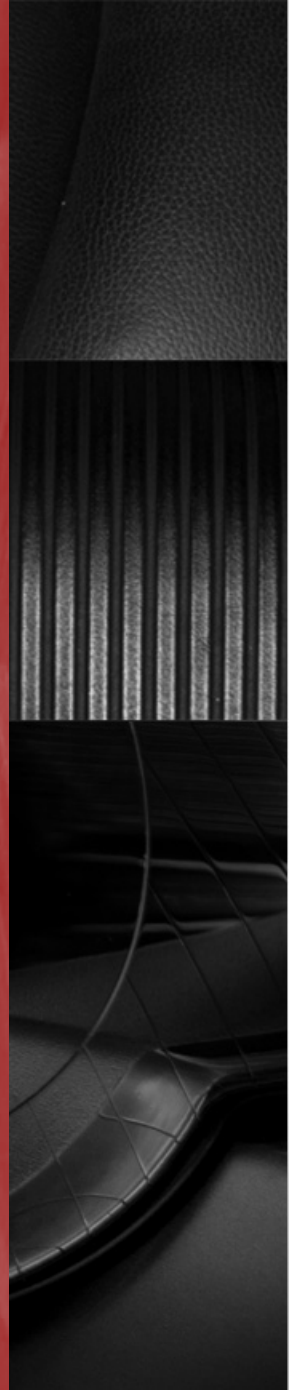


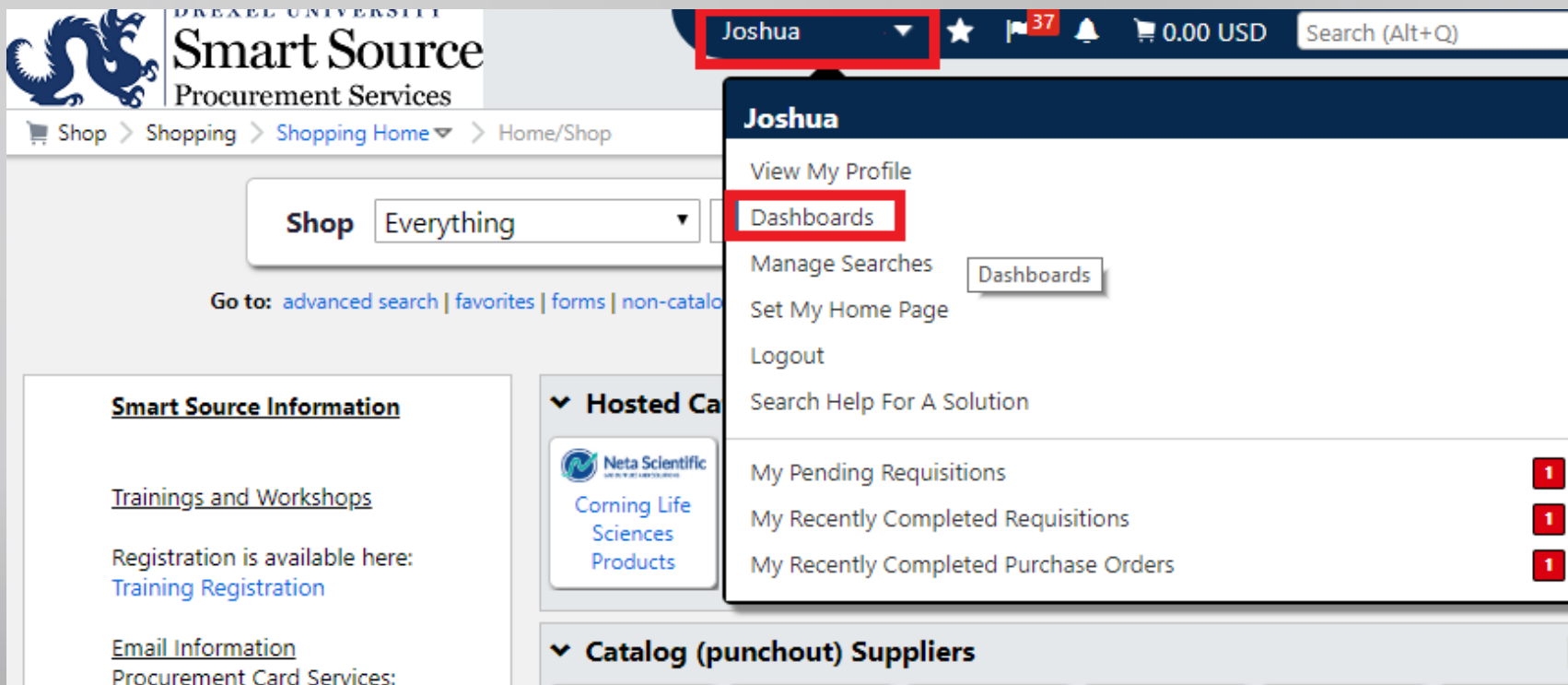
How to Create and Manage a Personal Dashboard

Procurement Services



Creating A Dashboard

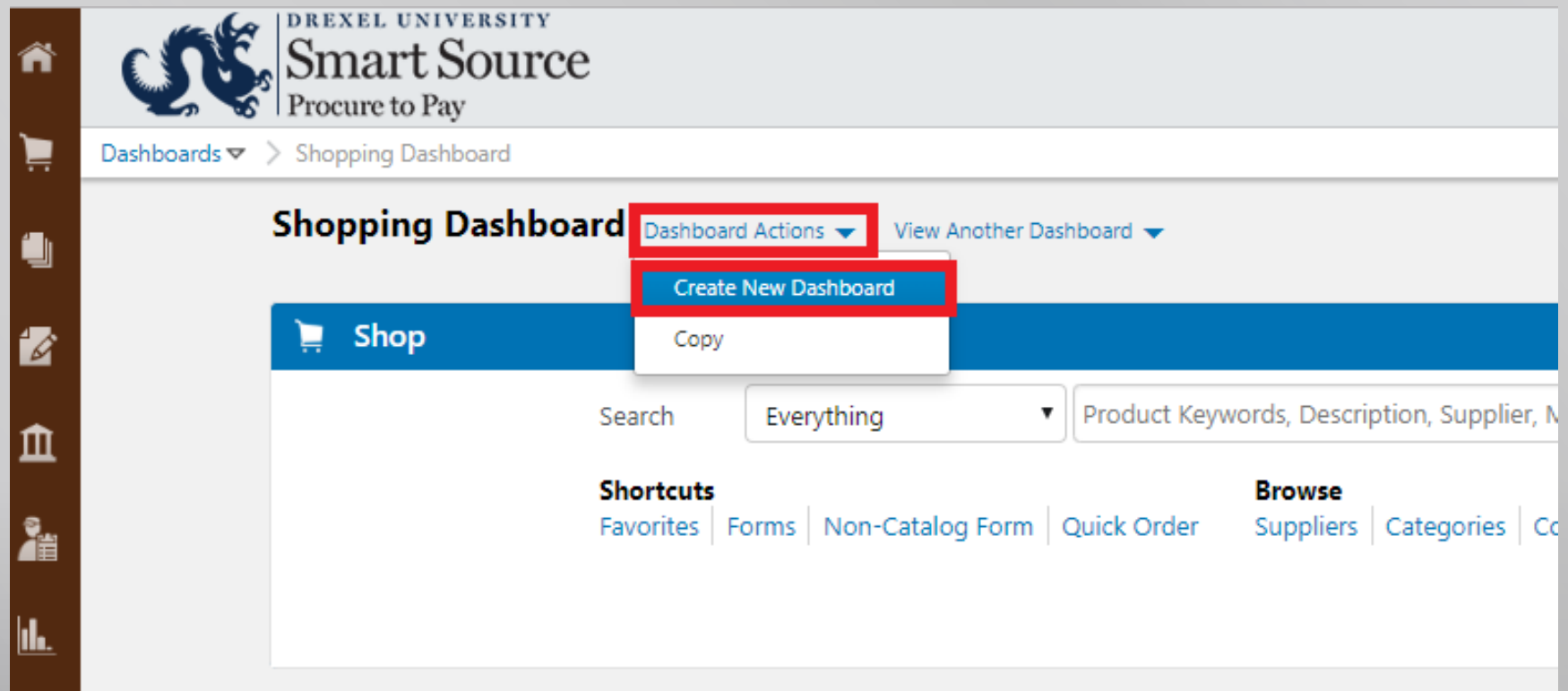
- Locate your User menu in the top-right banner. Click on your name and a window will appear, select “Dashboards”



The screenshot displays the Smart Source Procurement Services website interface. At the top, the logo for Drexel University Smart Source Procurement Services is visible on the left. The top navigation bar includes the user name "Joshua" (highlighted with a red box), a star icon, a notification bell with "37", a shopping cart icon with "0.00 USD", and a search bar labeled "Search (Alt+Q)". Below the navigation bar, the breadcrumb trail reads "Shop > Shopping > Shopping Home > Home/Shop". A "Shop" dropdown menu is set to "Everything". The main content area features a "Go to:" section with links for "advanced search", "favorites", "forms", and "non-catalog". On the left, there is a "Smart Source Information" section with links for "Trainings and Workshops" and "Training Registration". On the right, there is a "Hosted Catalog" section for "Neta Scientific" with a link for "Coming Life Sciences Products". A user menu is open, showing options: "View My Profile", "Dashboards" (highlighted with a red box), "Manage Searches" (with a "Dashboards" sub-menu), "Set My Home Page", "Logout", and "Search Help For A Solution". Below the menu, there are three items with red notification icons: "My Pending Requisitions", "My Recently Completed Requisitions", and "My Recently Completed Purchase Orders". At the bottom, there is a "Catalog (punchout) Suppliers" section.

Creating A Dashboard

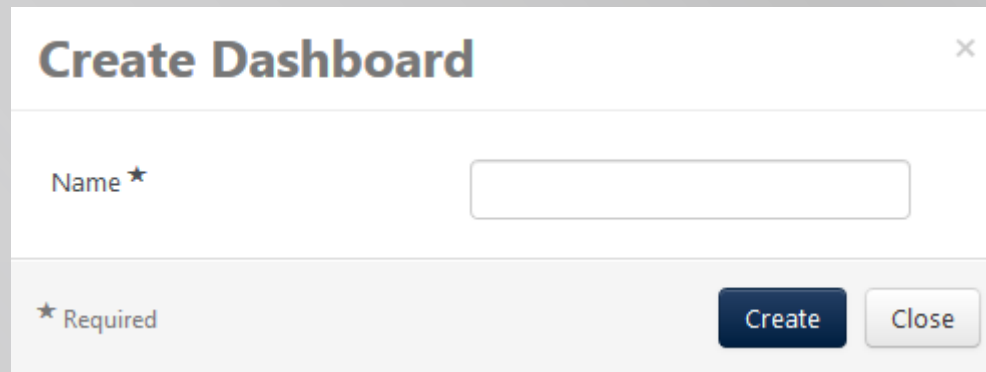
- To create a new dashboard, click on “Dashboard Actions” and select “Create New Dashboard”.



The screenshot shows the Drexel University Smart Source Procure to Pay interface. The top navigation bar includes the Drexel University logo and the text "Smart Source Procure to Pay". Below this, the breadcrumb trail reads "Dashboards > Shopping Dashboard". The main heading is "Shopping Dashboard", followed by a "Dashboard Actions" dropdown menu (highlighted with a red box) and a "View Another Dashboard" dropdown menu. The "Dashboard Actions" menu is open, showing a blue "Create New Dashboard" button (also highlighted with a red box) and a "Copy" option. Below the menu, there is a "Shop" button, a search bar with "Everything" selected, and a search scope dropdown showing "Product Keywords, Description, Supplier, M". The page also features "Shortcuts" (Favorites, Forms, Non-Catalog Form, Quick Order) and "Browse" (Suppliers, Categories, Co) sections.

Creating A Dashboard

- A window will appear asking you to input a “Name”, enter a meaningful name and click “Create”.

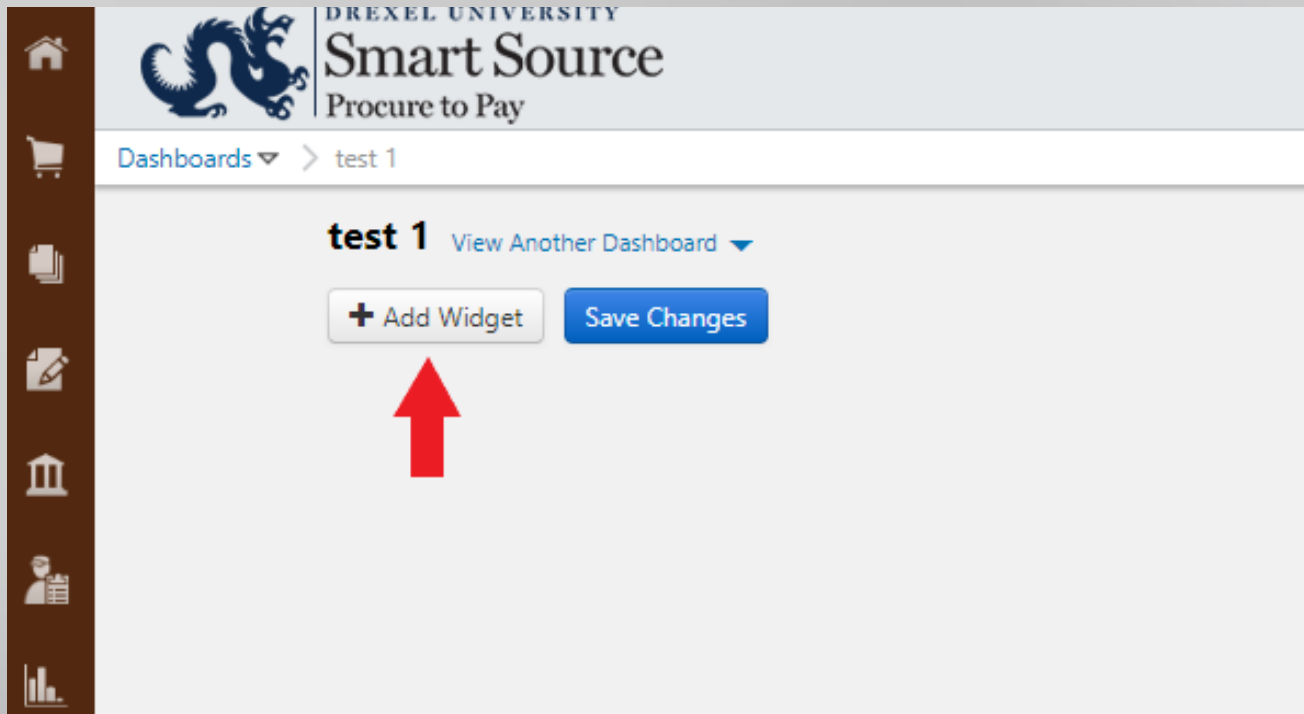


The image shows a dialog box titled "Create Dashboard" with a close button (X) in the top right corner. Below the title bar, there is a label "Name" followed by a red asterisk, indicating a required field. To the right of the label is an empty text input box. At the bottom left of the dialog, there is a red asterisk followed by the text "Required". At the bottom right, there are two buttons: a dark blue button labeled "Create" and a light gray button labeled "Close".

- The Dashboard has been created and will appear blank. This is because no Widgets have been added to the dashboard being displayed.

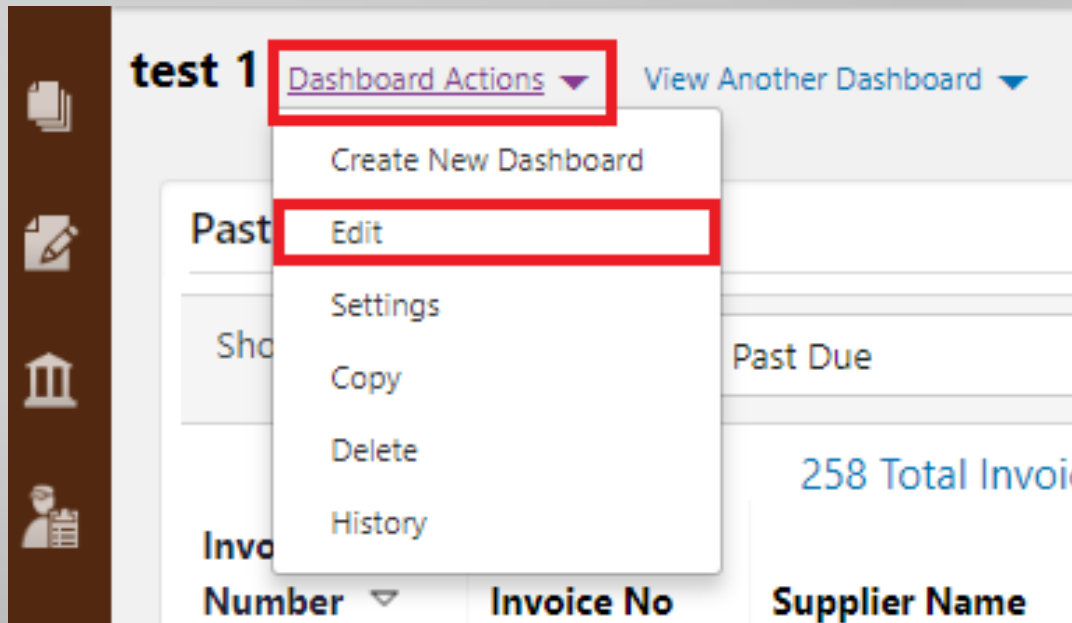
Adding Widgets to a Dashboard

- To add a widget to a newly created Dashboard click on the “+ Add Widget” button.



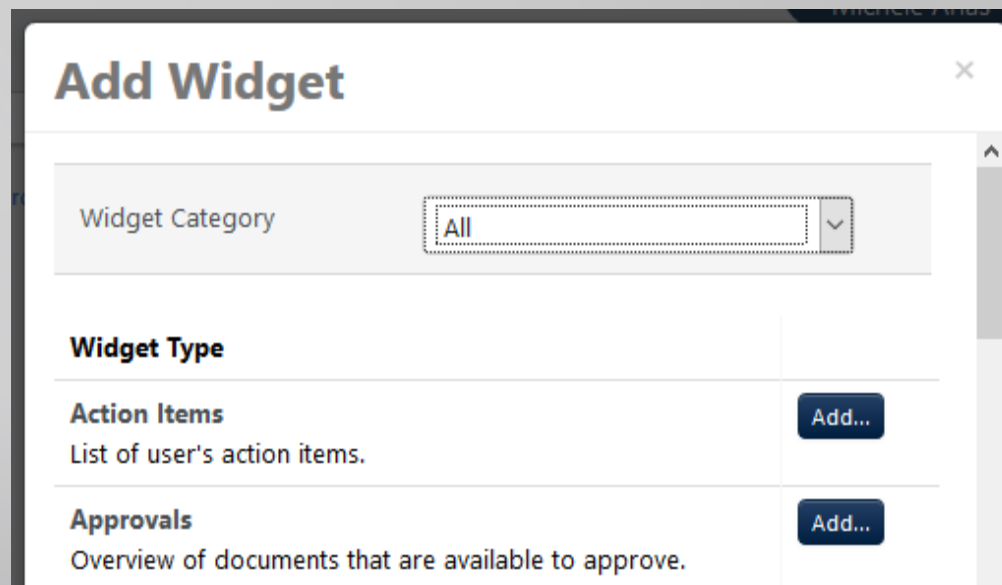
Adding Widgets to a Dashboard

- To add a widget to an already existing dashboard click on the “Dashboard Actions” and select “Edit” from the dropdown menu. Once the “+ Add Widget” button appears, click it. **NOTE:** This is not available for organizational dashboards



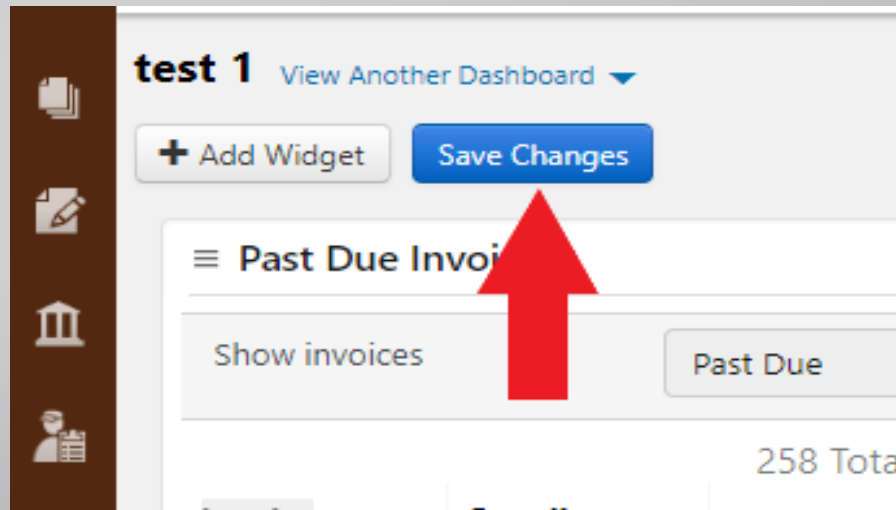
Adding Widgets to a Dashboard

- A window will appear that will list several Widget Types. Click the “Add...” button next to the Widget Type that is desired for the Dashboard. A dashboard can contain many different Widgets so be careful not to make that dashboard feel too “busy”.



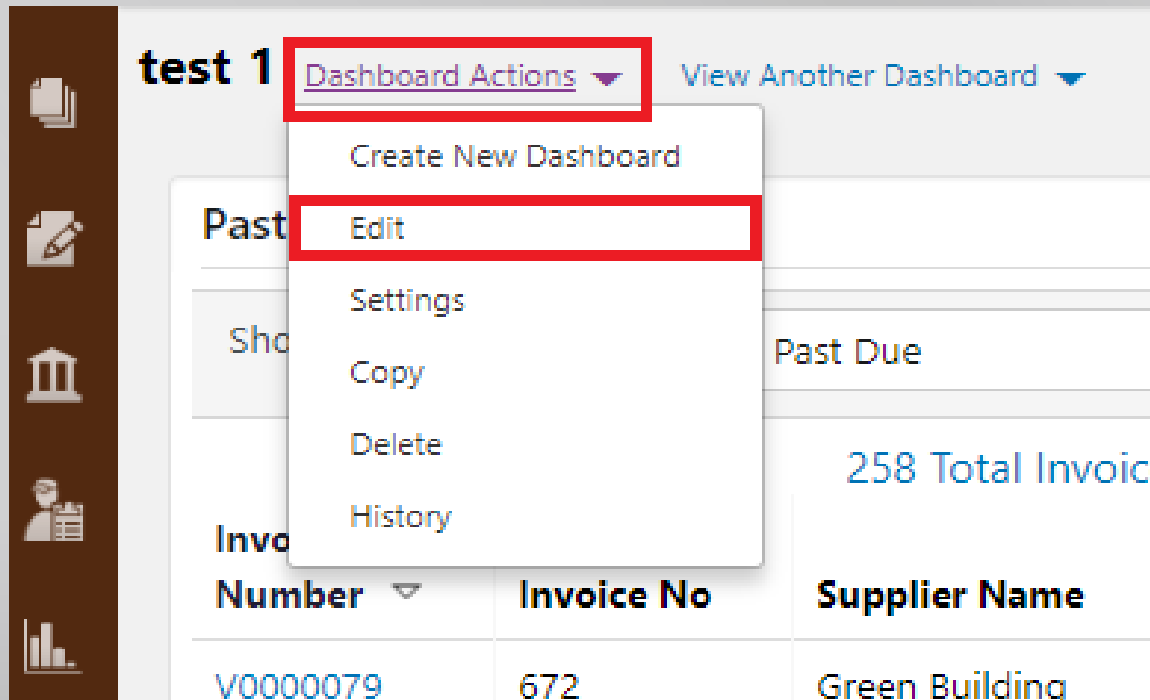
Adding Widgets to a Dashboard

- A list of the most helpful widgets can be found at the end of this document.
- Continue adding widgets until all desired Widgets have been added.
- Once done adding Widgets to the dashboard being displayed, select the “Save Changes” button at the top.



Viewing and Modifying Dashboards

- To remove a Widget from a dashboard, click on “Dashboard Actions” and then select “Edit”




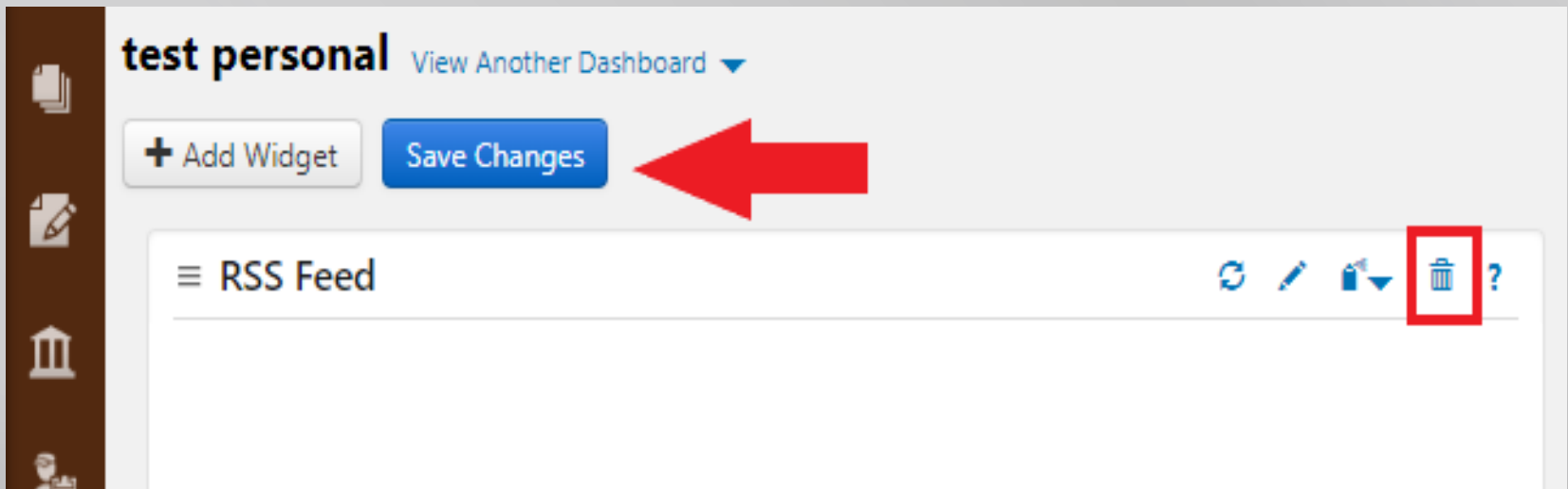
The screenshot shows a dashboard titled "test 1" with a "Dashboard Actions" dropdown menu open. The "Edit" option is highlighted. The dashboard displays a table of invoices and a summary of 258 total invoices.

Number	Invoice No	Supplier Name
V0000079	672	Green Building

Summary: 258 Total Invoices

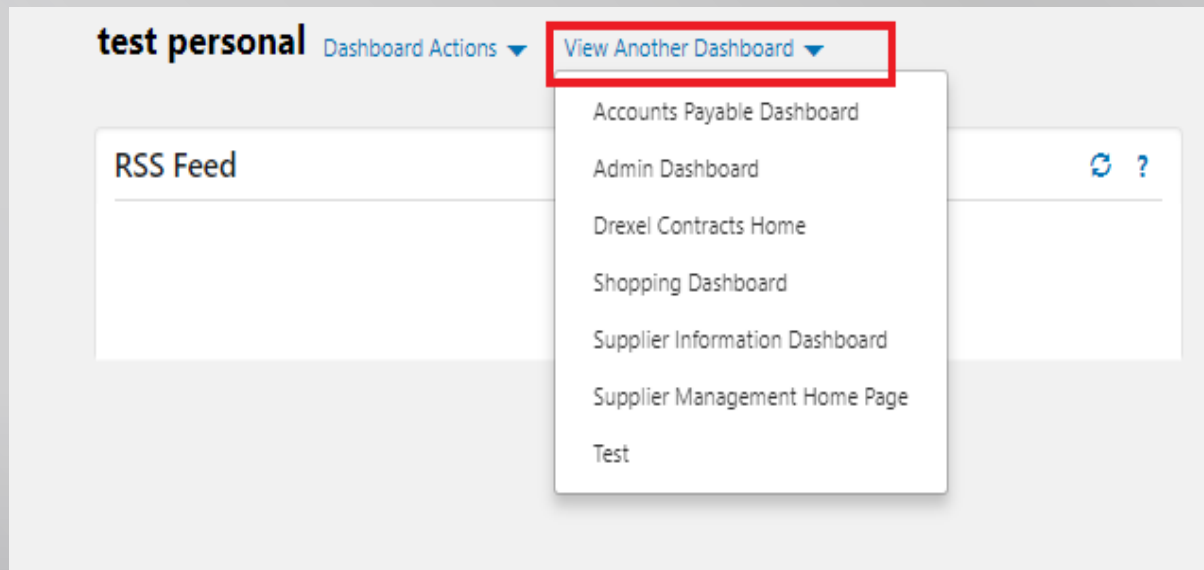
Viewing and Modifying Dashboards

- All Widgets on the dashboard should have several icons at the upper right of the Widget. Select the TRASH CAN icon (). Once all necessary Widgets have been removed click the “Save Changes” button.



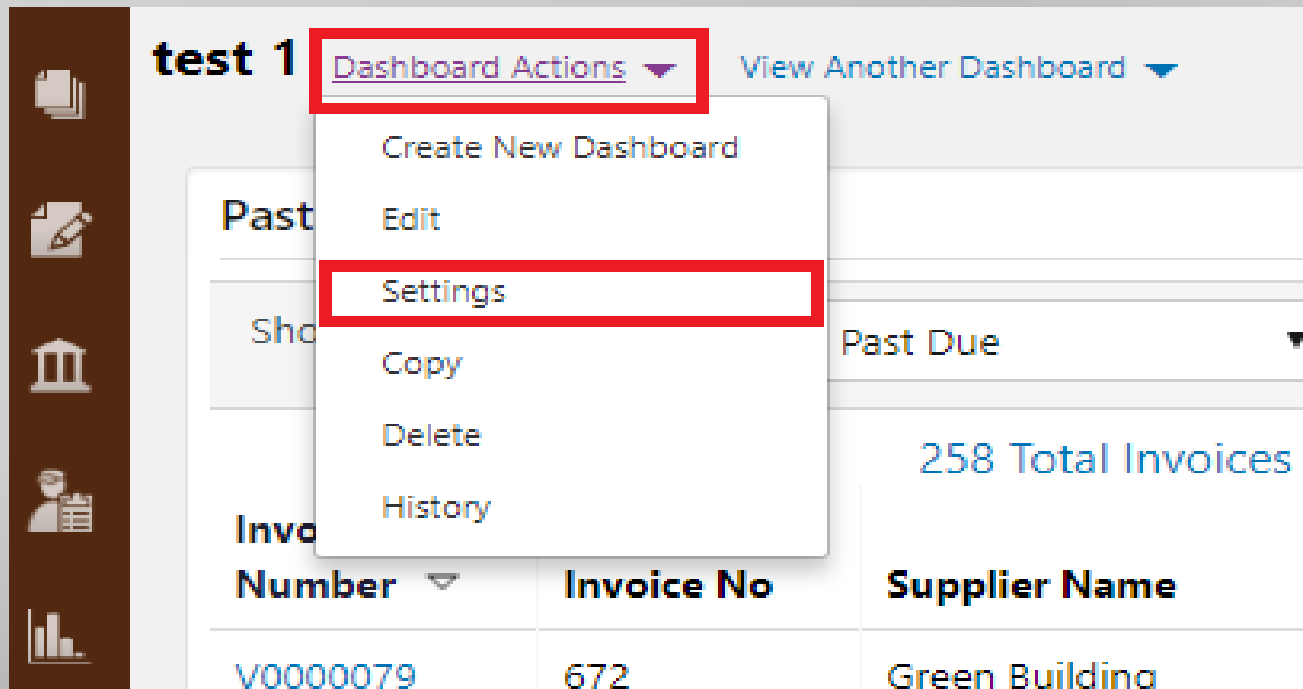
Viewing and Modifying Dashboards

- To view a different dashboard click “View Another Dashboard” and select the dashboard that is desired. **NOTE:** This field also displays any organizational dashboards that the user has access to.



Viewing and Modifying Dashboards

- To edit the name of a personal Dashboard, click on “Dashboard Actions” and then select “Settings”. **NOTE:** This is not available for organizational dashboards.

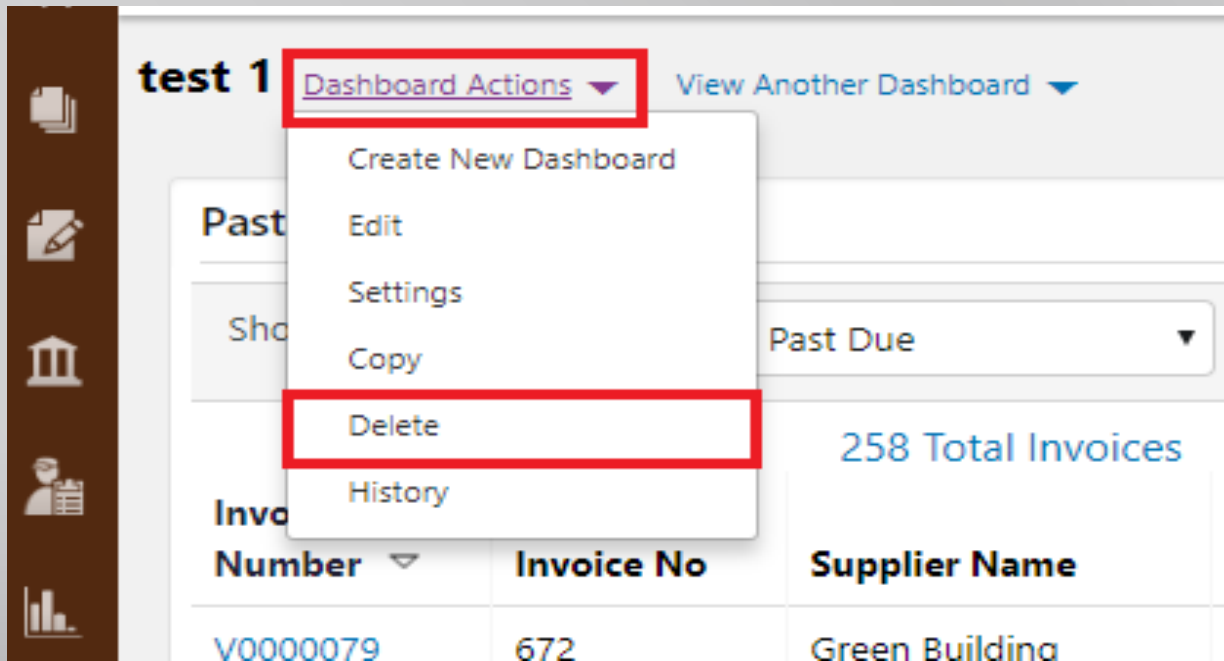


The screenshot shows a dashboard interface. On the left is a dark sidebar with several icons. The main content area has a header with 'test 1' and a 'Dashboard Actions' dropdown menu. The dropdown menu is open, showing options: 'Create New Dashboard', 'Edit', 'Settings', 'Copy', 'Delete', and 'History'. The 'Settings' option is highlighted with a red box. To the right of the dropdown is a 'View Another Dashboard' link. Below the header, there is a table with columns 'Number', 'Invoice No', and 'Supplier Name'. The first row of data shows 'V0000079', '672', and 'Green Building'. Above the table, there is a 'Past Due' section with a '258 Total Invoices' summary.

Number	Invoice No	Supplier Name
V0000079	672	Green Building

Viewing and Modifying Dashboards

- To delete the dashboard that is currently being displayed, click on “Dashboard Actions” and then select “Delete”. **NOTE:** This is not available for organizational dashboards.

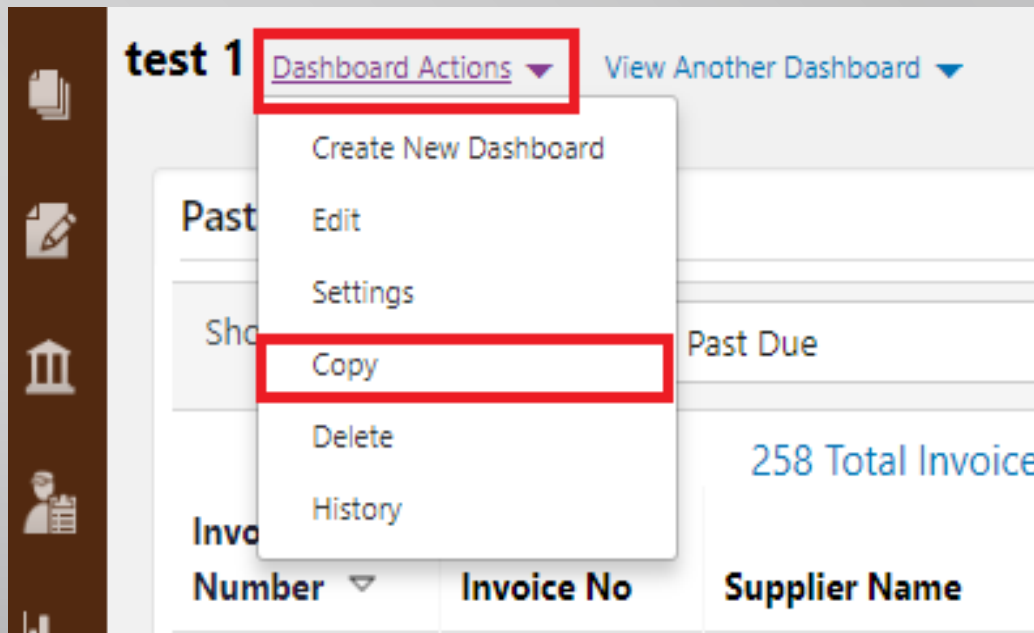


The screenshot shows a dashboard titled "test 1" with a "Dashboard Actions" dropdown menu open. The menu options are: Create New Dashboard, Edit, Settings, Copy, Delete, and History. The "Delete" option is highlighted with a red box. The dashboard content includes a "Past Due" filter, a "258 Total Invoices" summary, and a table with columns: Number, Invoice No, and Supplier Name. The table contains one row with values: V0000079, 672, and Green Building.

Number	Invoice No	Supplier Name
V0000079	672	Green Building

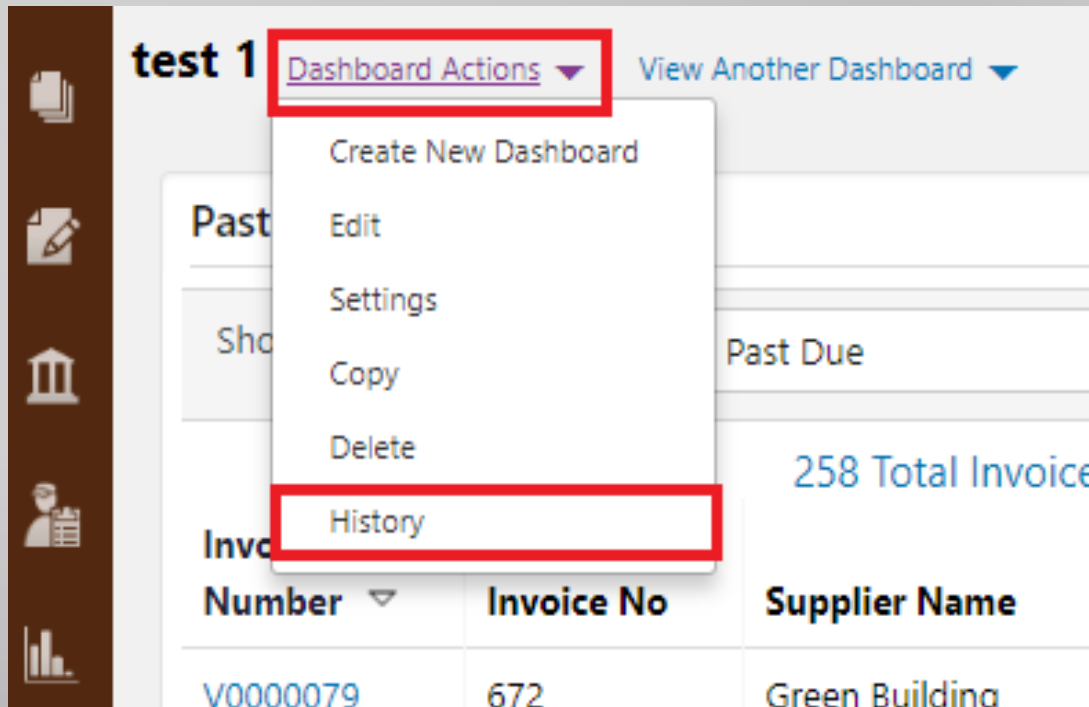
Viewing and Modifying Dashboards

- To copy the dashboard that is currently being displayed, click on “Dashboard Actions” and then select “Copy”. The copy will display on the screen. When you copy an organizational dashboard, it is important to remember that the dashboard created for the copy is a PERSONAL DASHBOARD and not an organizational dashboard.



Viewing and Modifying Dashboards

- To view the history of the dashboard that is currently being displayed, click on “Dashboard Actions” and then select “History”. **NOTE:** This is not available for organizational dashboards.



The screenshot shows a dashboard interface. On the left is a vertical navigation bar with icons for documents, editing, a building, a person, and a bar chart. The main content area is titled "test 1" and includes a "Dashboard Actions" dropdown menu (highlighted with a red box) and a "View Another Dashboard" link. The dropdown menu is open, showing options: "Create New Dashboard", "Edit", "Settings", "Copy", "Delete", and "History" (highlighted with a red box). Below the menu, there is a table with columns "Number", "Invoice No", and "Supplier Name". The table contains one row with values "V0000079", "672", and "Green Building". To the right of the table, there is a summary card showing "258 Total Invoice" and "Past Due".

Number	Invoice No	Supplier Name
V0000079	672	Green Building

Useful Widgets Table

- Below is a table of the most useful widgets:

Widget	Description	Solution/Function
Action Items	This widget displays action items for the user who is viewing the dashboard.	General
Approvals	This widget displays an overview of documents that are available to approve.	General
Bookmarks	This widget displays the bookmarks for the user who is viewing the dashboard.	General
Document Search	This widget allows users to search for documents directly from the dashboard.	All Solutions
Draft Carts	This widget displays a list of the user's draft carts.	Shopping
Forms	This widget provides organizations and users the ability to display a customized list of forms and form requests on the dashboard.	Shopping

Useful Widgets Table

Widget	Description	Solution/Function
Free-Form Text	This widget provides informational text for the dashboard.	General
Invoice Summary	This widget displays a user's invoices from the last 90 days in a graph view or list view.	Accounts Payable
My Approvals	Displays pending approvals for the user who is viewing the dashboard.	General
My Resources	Displays a pre-configured email address and phone number for system support.	General
Organization Message	Displays the configured Organization Message to the user who is viewing the dashboard.	General
Past Due Invoices	This widget displays a list of past due invoices.	Accounts Payable
Printed Handbooks	Allows users with appropriate permissions to access the PDF end-user handbooks.	General

Useful Widgets Table

Widget	Description	Solution/Function
Product Search	This widget allows shoppers to do a product search from the dashboard.	Shopping
Purchase Order Summary	This widget displays the user's purchase orders from the last 90 days in a list view or a graph view.	Shopping
Quick Links	This widget displays a customizable list of links for easy access to both internal and external sites.	General
Requisition Summary	This widget displays the user's requisitions from the last 90 days in list or graph view.	Shopping
RSS Feed	This widget displays an RSS feed such as blogs, etc.	General
Saved Search: Documents	Provides access to a SHARED saved document search for organizational dashboards. Personal dashboard scan access shared or personal saved searches.	General

Useful Widgets Table

Widget	Description	Solution/Function
Saved Search: Suppliers	Provides access to a SHARED saved supplier search for organizational dashboards. Personal dashboards can access shared or personal saved searches.	Supplier Management
Showcases	This widget displays the shopping showcases to which a user has access.	Shopping
Solutions and Help Links	Allows users with appropriate permissions to access the various customer solutions available in the site.	General
Spend Summary	This widget displays a graph of your organization's spend over time.	General
Supplier Search	This widget allows users to search for suppliers directly from the dashboard.	Supplier Management