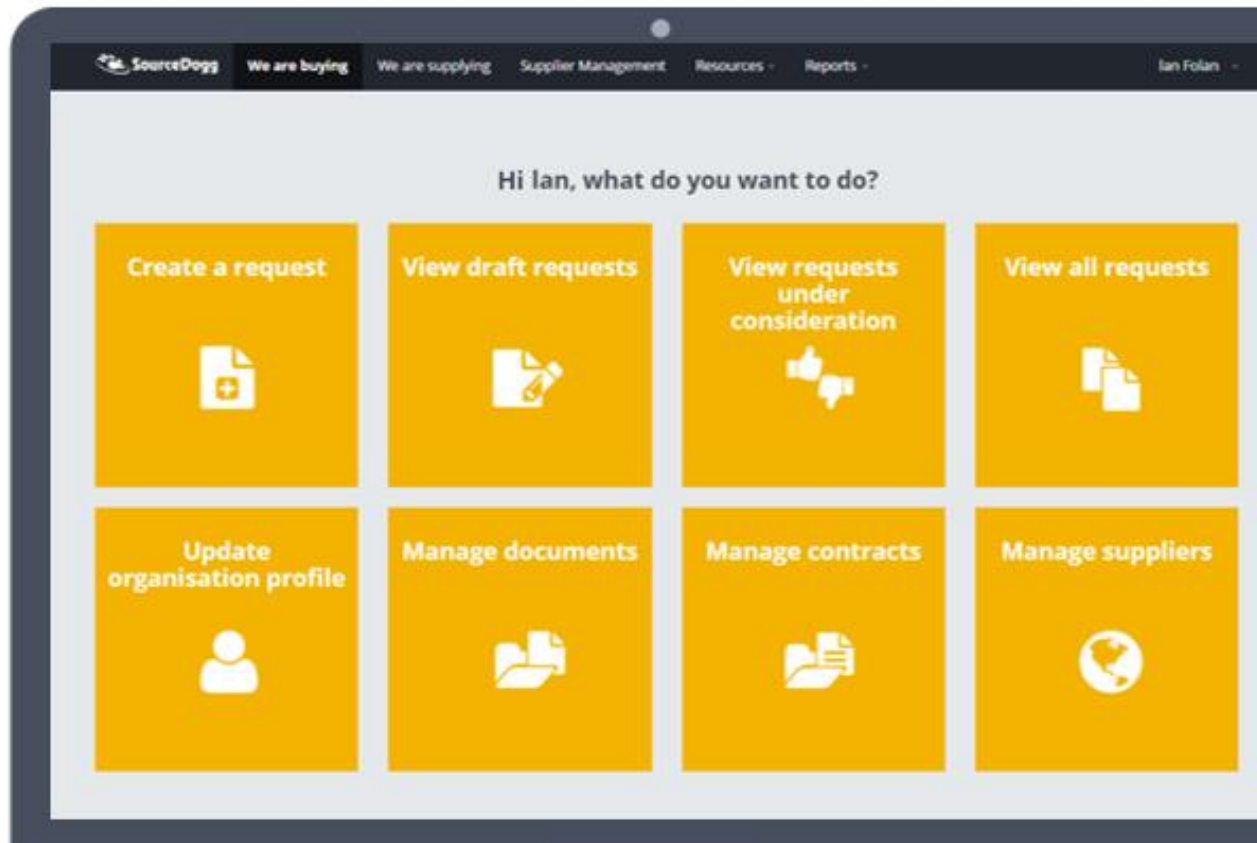




SourceDogg

Getting Started

Date: July 2017



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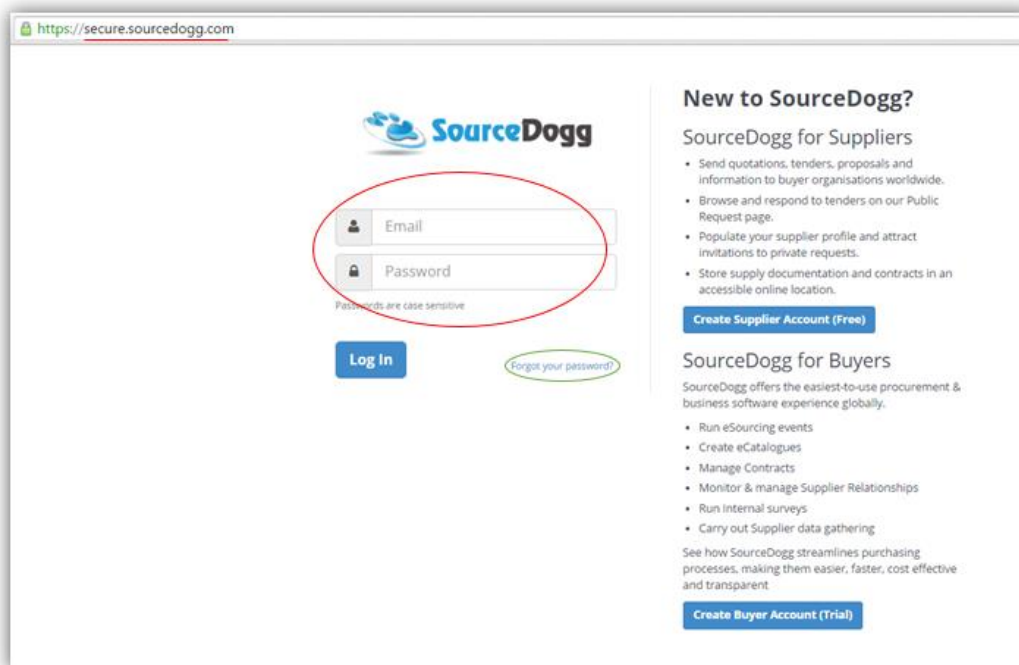
Logging in to SourceDogg

SourceDogg is a cloud based Software. Each user, whether Buyer or Supplier has a Username (email address) and a Password which they create themselves.

There are three ways to log into SourceDogg.

Direct from URL

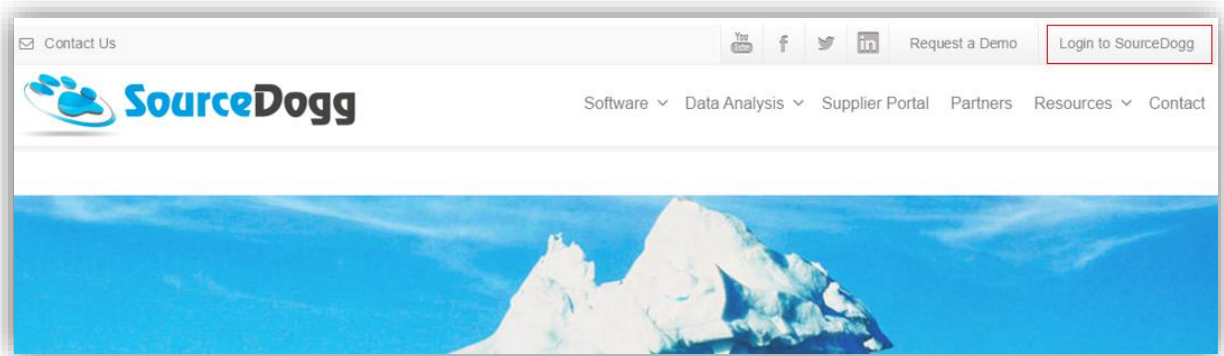
The URL or address is as follows: <https://secure.sourcedogg.com>



Enter an email address and the Password which has been previously created. Then select the Login button to access SourceDogg. Alternatively, if the Password is forgotten, simply select the 'forgot your password?' (circled in green above) and follow the prompts to reset the Password.

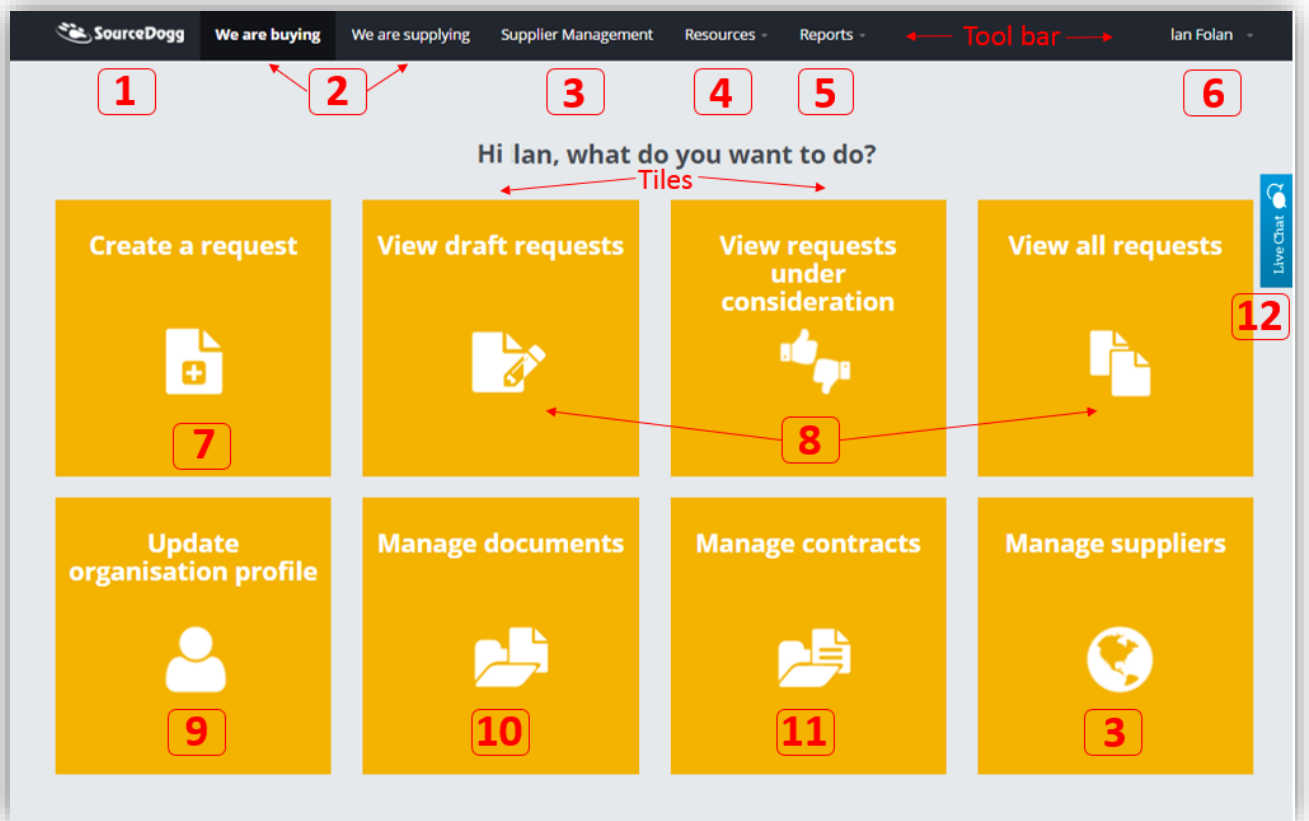
Via the SourceDogg website.

You can access the login page via the SourceDogg website www.sourcedogg.com. On the top right of the screen is a 'Login to SourceDogg' button. Click this and it will go directly to the application 'Login' page on secure.sourcedogg.com.



Basic Navigation

Below is the SourceDogg Homepage. Here, in red, are numbers 1-12. Please see below for an explanation of each option on the Tool bar and the Tiles.



The Tool Bar

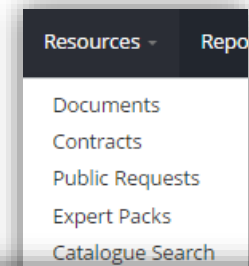
The tool bar is the main navigation point on SourceDogg, and regardless of where the User is in SourceDogg, this tool bar remains visible at the top of the page.

It will give quick and easy access to the following:

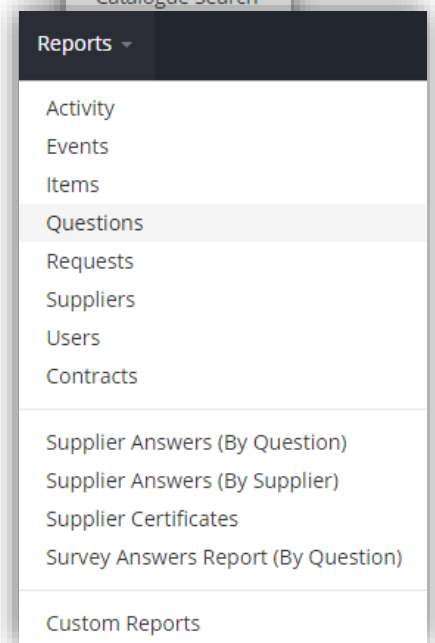
1. SourceDogg Logo: This Clickable SourceDogg logo will bring the User to the main SourceDogg homepage (as above).
2. We are buying & We are supplying: Assuming a Buyer & Supplier account has been set up, switching between these options will navigate between either the Buyer Portal (as above) or the Supplier Portal.

3. Supplier Management: This will navigate to the Supplier Management page, where the user can access the Supplier Pool or search through the SourceDogg Supplier Database.

4. Resources: The Resources Button will open a Dropdown menu with shortcuts to Documents, Contracts, Public requests, Expert Packs, Catalogue Search, Surveys, Auctions and Auction Bids. All of these options will be Covered in the User Guide Document.

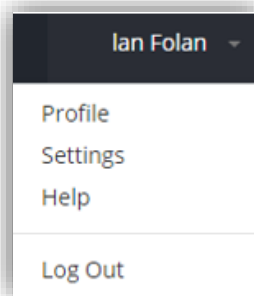


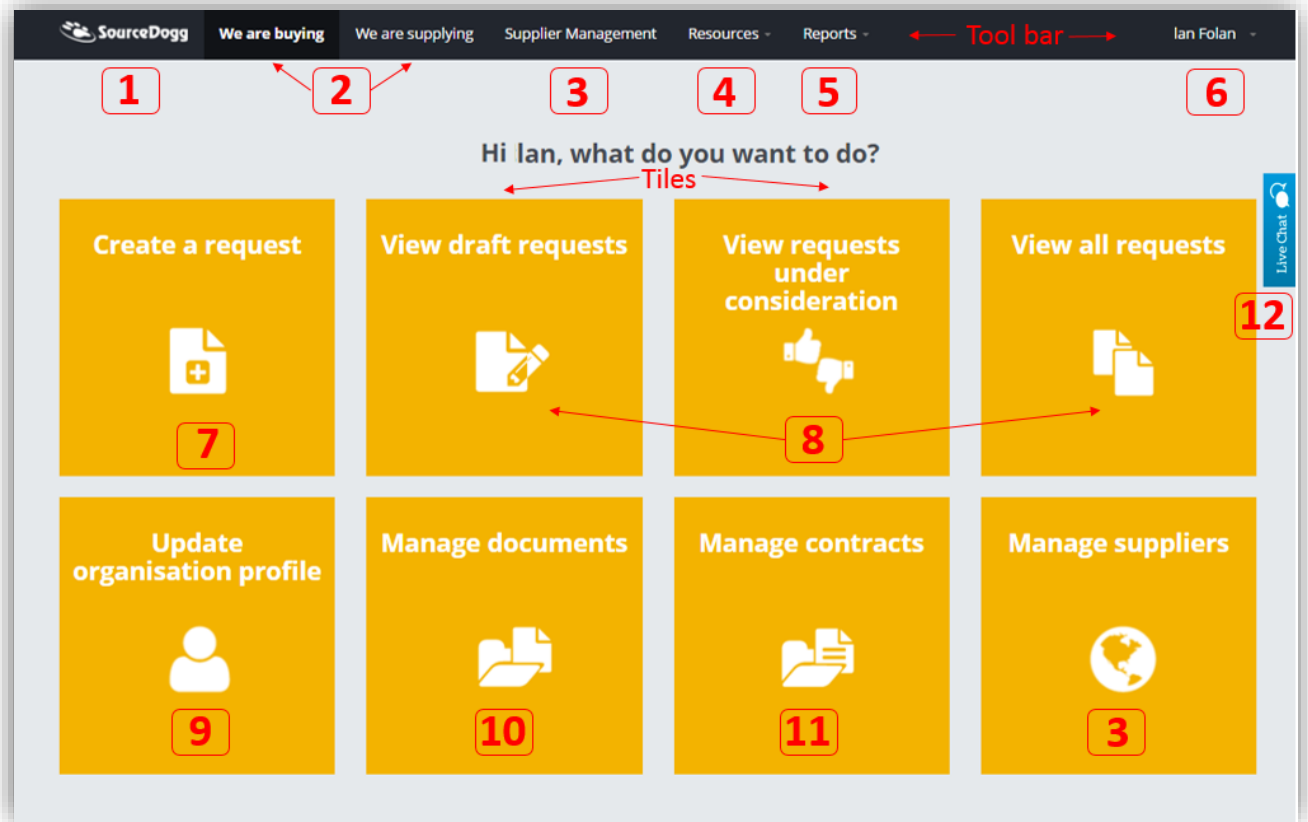
5. Reports: Similar to Resources, once the Reports button is clicked it will open a dropdown menu. Clicking on one of the available options will generate the related report. The options available are Activity, Events, Items, Questions, Requests, Suppliers, Custom Field History, Users, Contracts, Supplier Answers (By Question), Supplier Answers (By Supplier), Supplier Certificates, Survey Answers report (By Question) & Custom Reports. More information on SourceDogg reporting can be found in the Reports User Guide.



6. User Name: When the User name is clicked, another dropdown will open. A Shortcut to Profile, Settings, & Help can be selected here. Each of these will be explained in more detail in their relevant User Guides.

To Log Out of SourceDogg, simply click the Log Out button and the User will be brought back to the Login page.





The SourceDogg Tiles

These 8 yellow tiles make up the SourceDogg Homepage. Each of these Tiles will navigate to the most frequently used areas in SourceDogg which are as follows:

7. **Create a Request:** Selecting this will direct the User to a blank SourceDogg eRFx where the process begins to Create a Request for Tender/Information/Proposal/Quote or Supplier Onboard.
8. **View Draft request, View request Under Consideration, View All Requests:** These three options are to do with the Requests your organisation have created in SourceDogg. **View Draft requests** will navigate to any request that is in draft mode. **View Requests under Consideration** will navigate to and request that is ready to be evaluated or is currently being evaluated. **View all requests** will navigate to every request that is in draft, published, under consideration or completed. See All Request Screen on Page 11.
9. **Update organisation profile:** This will navigate to the organisation settings page. This is where all information pertaining to the User organisation on SourceDogg is captured and managed.
10. **Manage Documents:** This is where Documents & files can be stored, managed and accessed by anyone within the User organisation.

11. **Manage Contracts:** Selecting this will navigate to SourceDogg’s Contract Management tool. This is where contracts can be stored, controlled, recorded and managed.

12. **Manage Suppliers Tile** see the Supplier Management section.

Search through all Requests by Tag or Title or scroll though pages.

Draft, Pending Approval and Approved Requests.

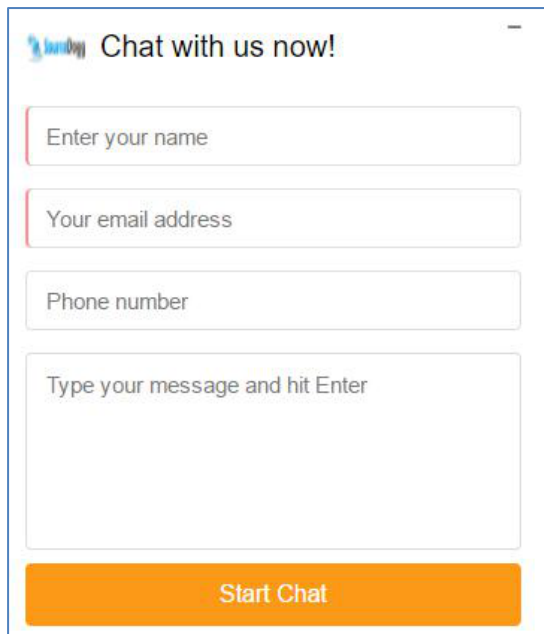
Published Requests, Under Consideration and Awarded Requests.

All Templates Created.

Closed, Cancelled and No Successful Submissions Requests

SourceDogg Live Chat.

- 13. Live Chat:** The SourceDogg live chat icon is always found on the right of the screen. At any time this can be selected and the User will have access our Customer Service or Technical Support Team. The SourceDogg Customer Support Team will aid and assist in any questions/issues the User has with SourceDogg.



Chat with us now!

Enter your name

Your email address

Phone number

Type your message and hit Enter

Start Chat

To start the chat, fill the information about you such as your name and email (mandatory fields) and describe your problem to customer service representative so we can help you quickly.

Settings (Basic)

In this User Guide, Settings is split into Basic and Advanced. The Basic section will explain the most common areas to be aware of whereas the Advanced section will explore the more complex settings functionality within SourceDogg.

In the basic Section, we will explore changing a password, setting the correct time zone, adding a user and the request settings section.

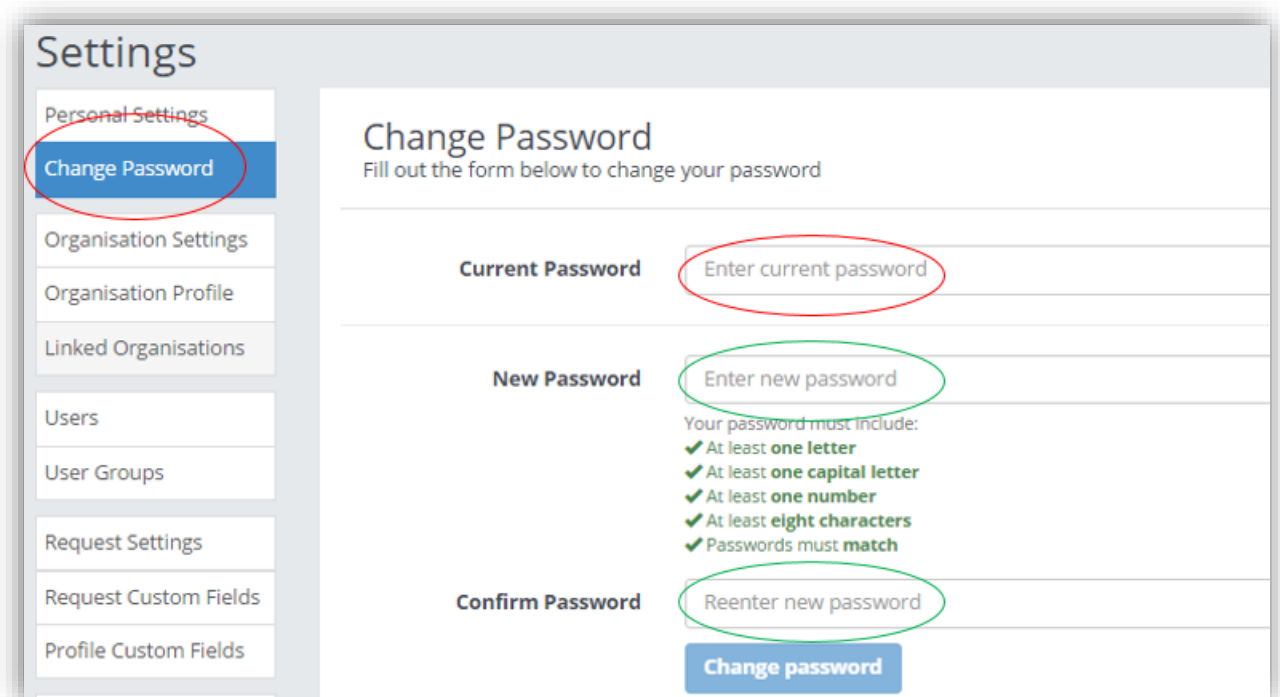
Change Password

To change your SourceDogg Password, simply click 'Settings' from the drop down in the top right of the tool bar. Then select 'Change Password' which is the second option in the options on the left of the screen. You then simply follow the steps to create a new password.

Important to note:

With any Password you create in SourceDogg, it must contain the following:

- At least one letter
- At least one capital letter
- At least one number
- At least eight characters



Organisation Settings

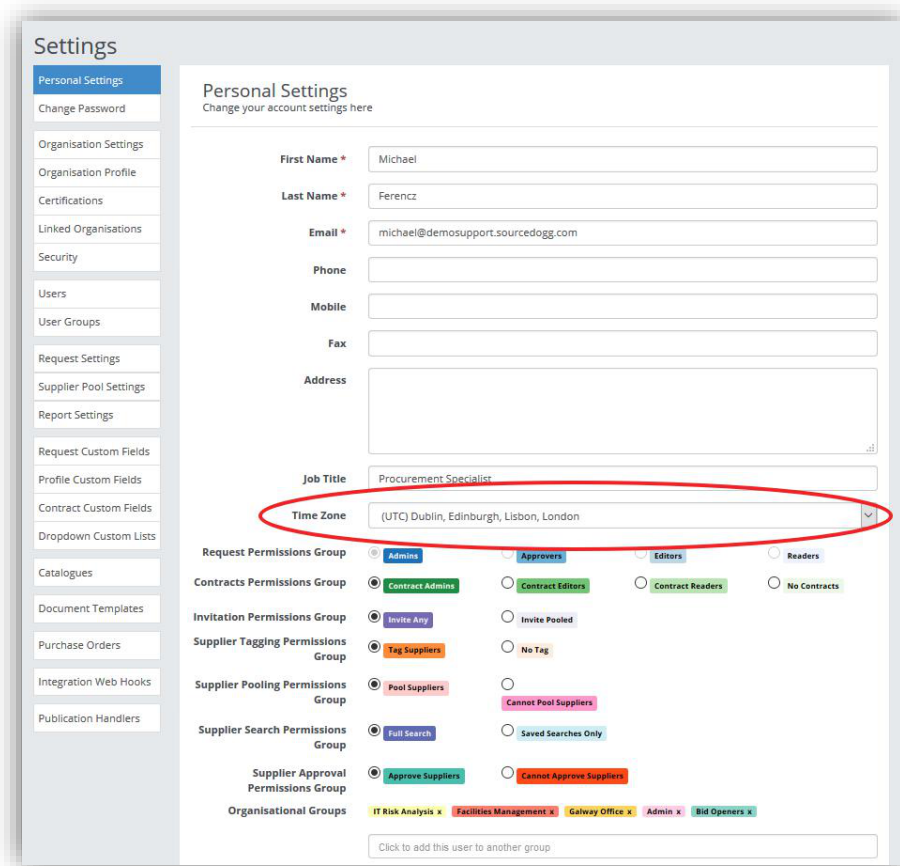
This is where you can set up default Time Zone, Date Format and Currency for your account.

Selecting the correct time zone for your organisation is important as it will govern the deadline dates for request and surveys you create.

| | |
|----------------------------|---|
| Organisation Name * | International Courier Service |
| Time Zone | (UTC) Dublin, Edinburgh, Lisbon, London |
| Date Format | DD/MM/YYYY (e.g. 20/07/2017) |
| Primary Currency | EUR (€) |
| Account Type | Buyer & Supplier |

Personal Settings

Below is a screen grab of the personal settings options. Note the highlighted section where the time zone is selected. It is essential for every user working outside of the main organisation time zone to set up their correct time zone in order for the system to display all the information correctly.



Settings

Personal Settings
Change your account settings here

First Name * Michael

Last Name * Ferencz

Email * michael@demosupport.sourcedogg.com

Phone

Mobile

Fax

Address

Job Title Procurement Specialist

Time Zone (UTC) Dublin, Edinburgh, Lisbon, London

Request Permissions Group Admins Approvers Editors Readers

Contracts Permissions Group Contract Admins Contract Editors Contract Readers No Contracts

Invitation Permissions Group Invite Any Invite Pooled

Supplier Tagging Permissions Group Tag Suppliers No Tag

Supplier Pooling Permissions Group Pool Suppliers Cannot Pool Suppliers

Supplier Search Permissions Group Full Search Saved Searches Only

Supplier Approval Permissions Group Approve Suppliers Cannot Approve Suppliers

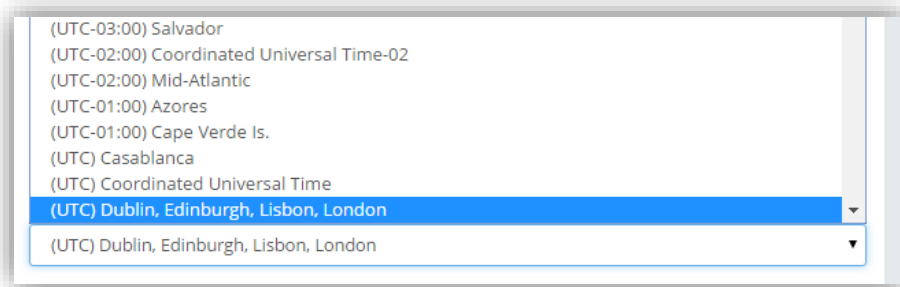
Organisational Groups IT Risk Analysis x Facilities Management x Galway Office x Admin x Bid Openers x

Click to add this user to another group

In the following Screen Grab are the options available for changing the time zone. Once the correct time zone is selected, make sure to click the Save button at the bottom of the page.

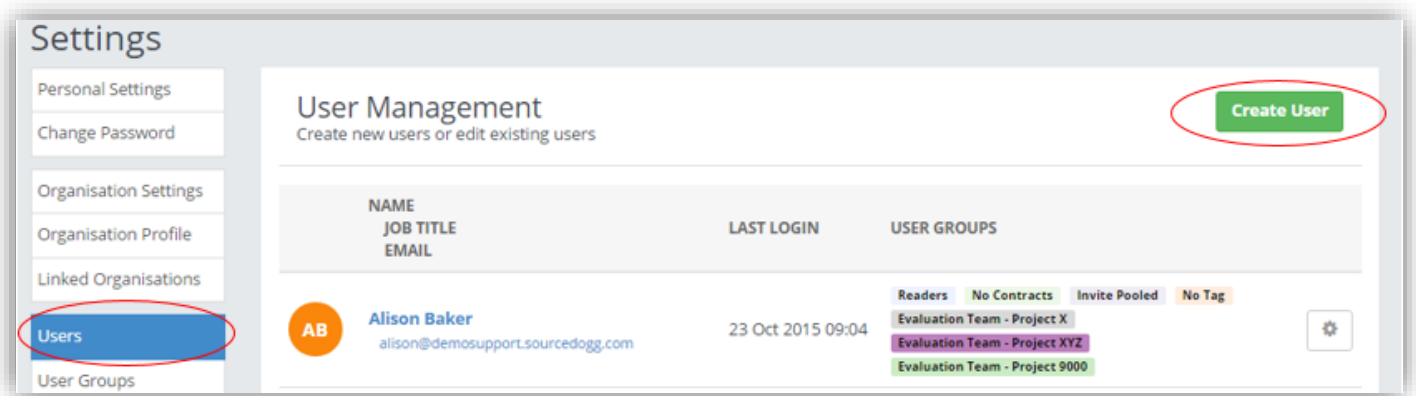
Important to Note:

If the Save Button is a **darker blue**, this means changes have been made and it must be saved, but if it is a **lighter blue**, no changes have been made.



Add a User

To add a user, select 'Settings' in the drop down in the tool bar. 'Users' is the fifth sub-menu option on the left-hand side of the screen. In 'Users', you can view of all the Users added to the account, when they last logged in, and their permissions. To add a User, click 'Create User' on the right.



When you select 'Create User', the below screen will open. When creating a new user you must enter a First Name, Last Name, and Email.

Settings

- Personal Settings
- Change Password
- Organisation Settings
- Organisation Profile
- Linked Organisations
- Users**
- User Groups
- Request Settings
- Request Custom Fields
- Profile Custom Fields
- Catalogues
- Document Templates
- Purchase Orders
- Integration Web Hooks

Create User

Fill out the form below to create a new user. The person receives an activation email from SourceDogg with brief instructions on how to complete the account set-up process.

Enter the New User details here. *=Mandatory fields

First Name *
Last Name *
Email *
Phone
Mobile
Fax
Address
Job Title
Time Zone

Request Permissions Group
 Admins Approvers Editors Readers
 Contracts Permissions Group
 Contract Admins Contract Editors Contract Readers No Contracts
 Invitation Permissions Group
 Invite Any Invite Pooled
 Supplier Tagging Permissions Group
 Tag Suppliers No Tag
 Supplier Pooling Permissions Group
 Pool Suppliers Cannot Pool Suppliers
 Supplier Search Permissions Group
 Full Search Saved Searches Only
 Supplier Approval Permissions Group
 Approve Suppliers Cannot Approve Suppliers

Organisational Groups
 IT Risk Analysis x Facilities Management x Galway Office x Admin x Bid Openers x

Special User Permissions

Select appropriate user permissions for the user. See below for the differences between various levels of user access.

| Request Permissions | | ADMINS | APPROVERS | EDITORS | READERS |
|---------------------|--------------------------------|---|-----------|---------|-----------|
| Requests | Create/Edit Request | ✓ | ✓ | ✓ | |
| | Approve Request Content | ✓ | ✓ | | |
| | Review / Score Request | ✓ | ✓ | ✓ | ✓ |
| | Cancel Request | ✓ | ✓ | ✓ | |
| | Request Analysis / Reporting | ✓ | ✓ | ✓ | ✓ |
| | Supplier Approval [?] | ✓ | ✓ | | |
| Resources | Organisational Reports | ✓ | | | |
| | Supplier Management | ✓ | ✓ | ✓ | Read only |
| | Contract Management | <i>As per user's "Contract Permissions" setting</i> | | | |
| | Document Management | ✓ | ✓ | ✓ | Read only |
| Settings | Personal Settings | ✓ | ✓ | ✓ | ✓ |
| | Organisation Settings | ✓ | | | |
| | Organisation Profile | ✓ | | | |
| | User Management | ✓ | | | |

| Contract Permissions | | CONTRACT ADMINS | CONTRACT EDITORS | CONTRACT READERS | NO CONTRACTS |
|-------------------------|---|-----------------|------------------|------------------|--------------|
| Create/Edit Contract | ✓ | ✓ | | | |
| View Contract | ✓ | ✓ | ✓ | | |
| Delete Contract | ✓ | ✓ | | | |
| Manage Contract Members | ✓ | ✓ | | | |
| Manage Reminders | ✓ | ✓ | | | |
| Get reminders by email | ✓ | ✓ | ✓ | | |

In addition to these basic level of settings, further settings can be selected that would define the permissions level for the user.

Invitation Permissions Group
 Invite Any
 Invite Pooled

“Invitation Permissions Group” governs the user’s ability to invite suppliers to any RFX event. Users with “Invite Any” are able to invite any supplier, either from the supplier database or by email. Users with “Invite Pooled” selected are only able to invite suppliers that have been added to the organisation Supplier Pool in SourceDogg. These users are also blocked from inviting suppliers to requests via email.

Supplier Tagging Permissions Group
 Tag Suppliers
 No Tag

The “Supplier Tagging Permissions Group” will allow you to select whether the user should be permitted to tag suppliers or not.

Supplier Pooling Permissions Group
 Pool Suppliers
 Cannot Pool Suppliers

The Supplier Pooling Permissions Group settings, control the user’s ability to add suppliers to pool through supplier management module.

Supplier Search Permissions Group
 Full Search
 Saved Searches Only

Supplier Search Permission allows users to search the entire supplier database or be limited to particular groups or sub-pools of suppliers via the Saved Search functionality.

Supplier Approval Permissions Group
 Approve Suppliers
 Cannot Approve Suppliers

Users can be given the role of Supplier Approver in the new Supplier On-board request type. This allows them to approve or reject a supplier’s addition to the supplier pool. Users given the “Approve Suppliers” permission can be added to the request team as a Supplier Approver.

Important to Note:

Once a New User is created on SourceDogg, the New User will receive an email to create a password. Once they have followed the prompts to do this, they will be able to login to SourceDogg.