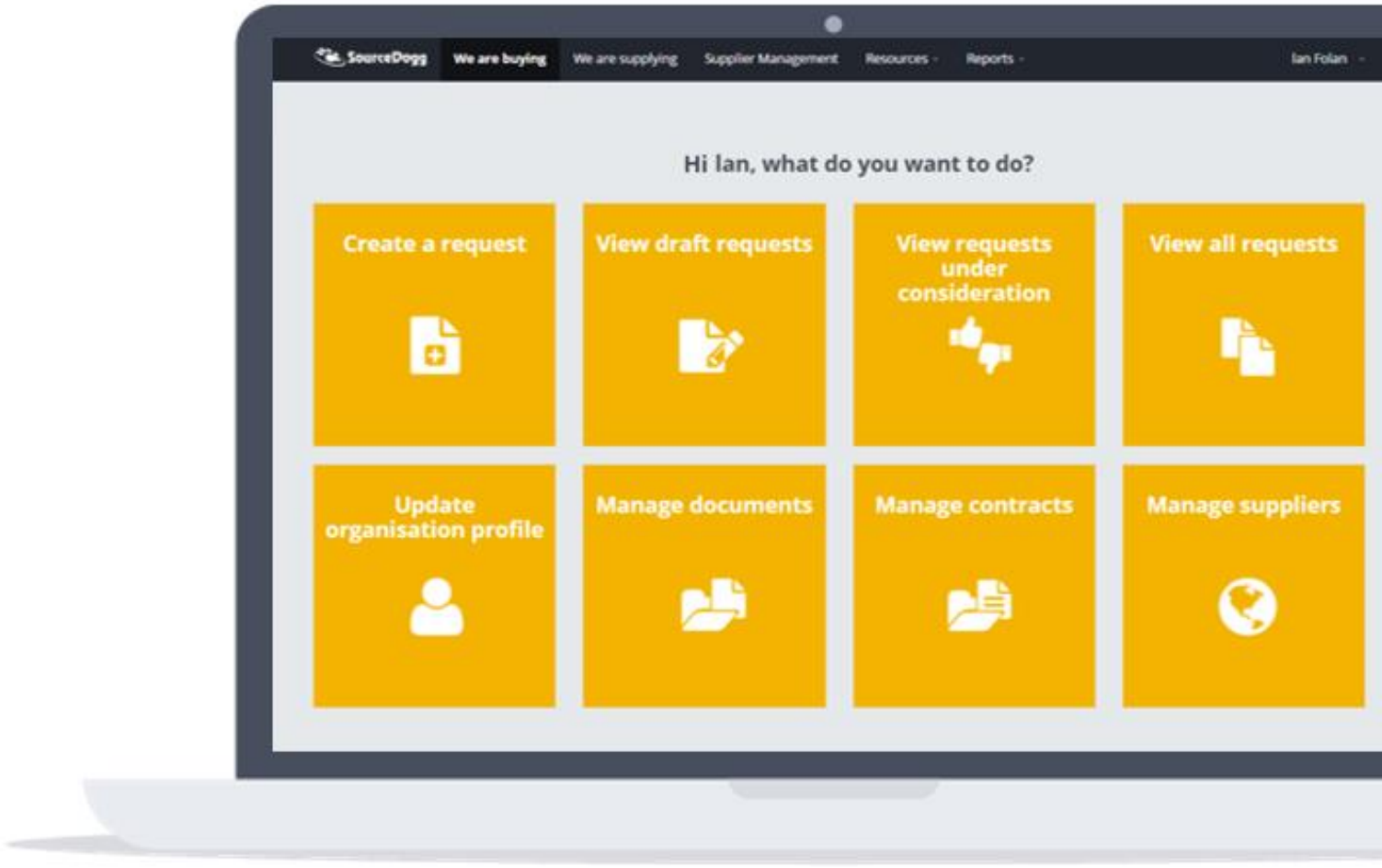
Administrator

User Guide

Date: July 2020



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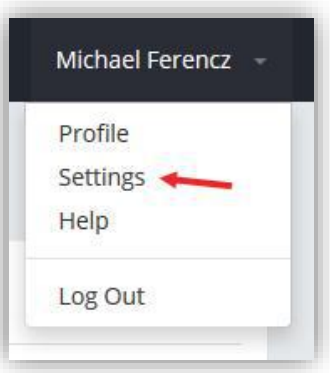
Introduction

Users in SourceDogg with Administrator level permissions have the capability to affect the usability of the application and set up certain functionalities in order these to match their organisation's requirements and workflows. These settings can affect the overall usability of SourceDogg for other users, it is, therefore, a key for Administrator to understand the various settings within the system and use these with caution. If you are in doubt about any settings described in this guide, please contact the member of SourceDogg Customer Service team on customerservice@sourcedogg.com

To access the administrator settings, click on your user name in the top right-hand corner and select 'Settings'. A menu will be displayed on the left-hand side with various categories of settings you can edit.



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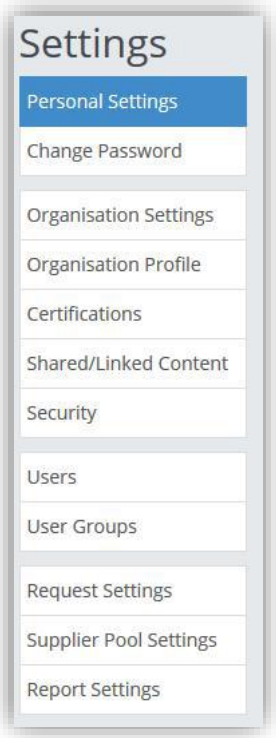

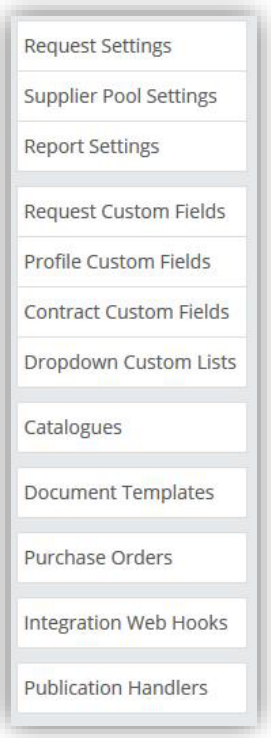

Organisation Settings

This is where you set up the basic information about your company, e.g. Organisation Name, Timezone, Date Format and currency.

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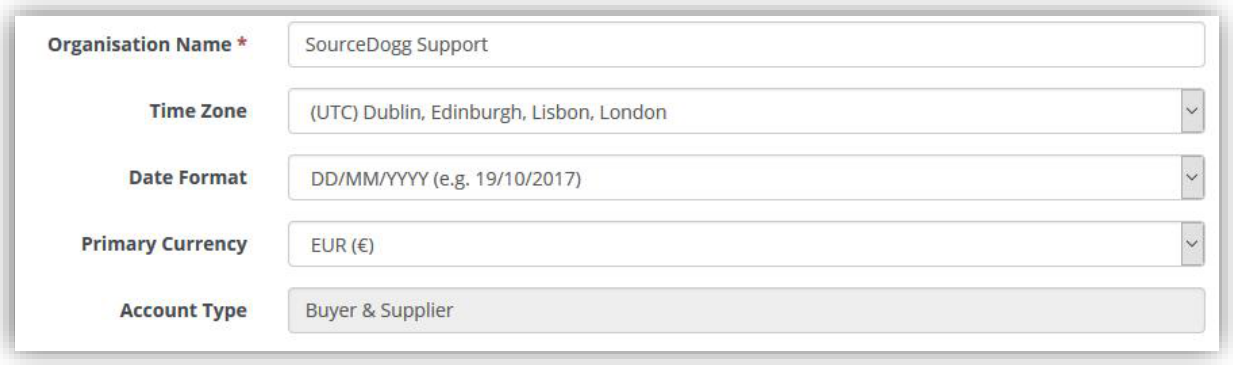
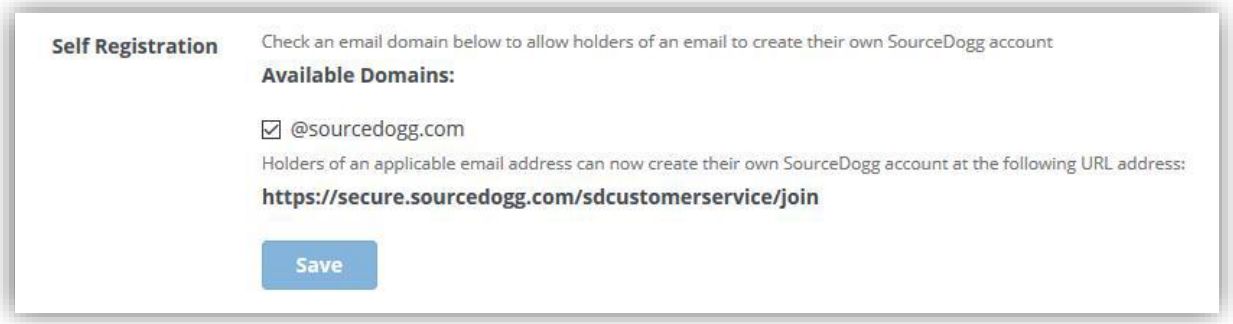


You can also activate the functionality of Self Registration. The holder of email with the appropriate email domain will be able to create an account using the link that you can share with them. To activate this, please select the domain name displayed on the page and then share the link with your colleagues.



Security

IP Address Settings

Here you can set up access to your SourceDogg account. If needed, you can specify the IP range that users must use to be able to access the account, e.g. users must be in the office to log in to SourceDogg.

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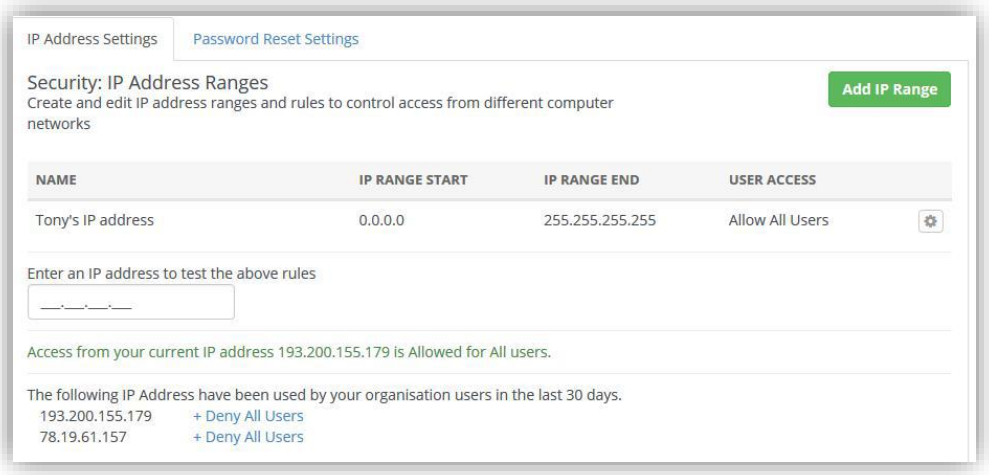
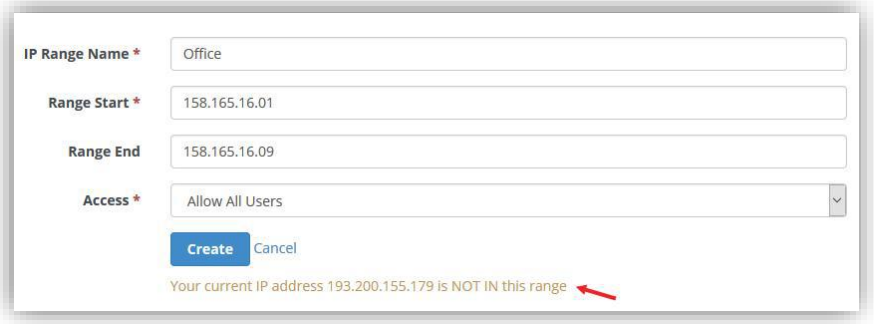


To add a new range, click on the 'Add IP Range' button and complete the information required.



You must enter the range start and range end of the rule and then select one of the access options. Options available are Allow All Users (will allow access of all users using these IP addresses), Deny All Users (will result in anybody using the addresses from the range being denied the access) and Allow Only Admins (this will allow only administrator users using these IP addresses to access the account.)

If your current IP address is outside the range, this will be displayed as a warning below the 'Create' button.

Please note there is a default IP range covering all the possible IP addresses in your account settings. If you delete this rule before you add a more specific one, your account will be locked! You will need to contact Customer Service to access the account again.

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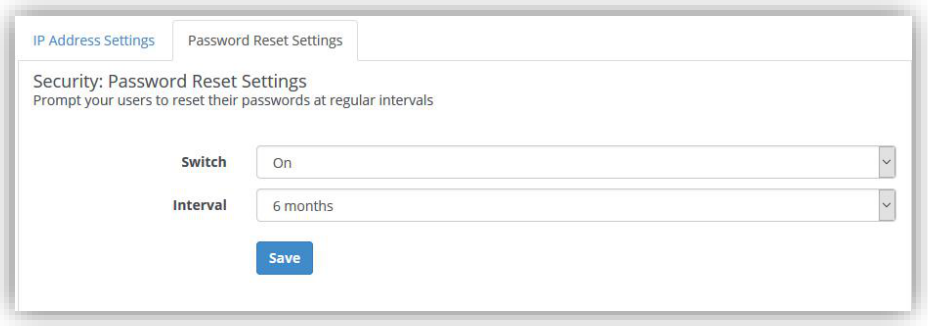
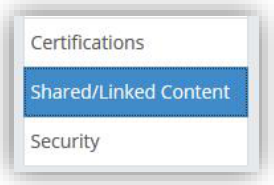
Password Reset Settings

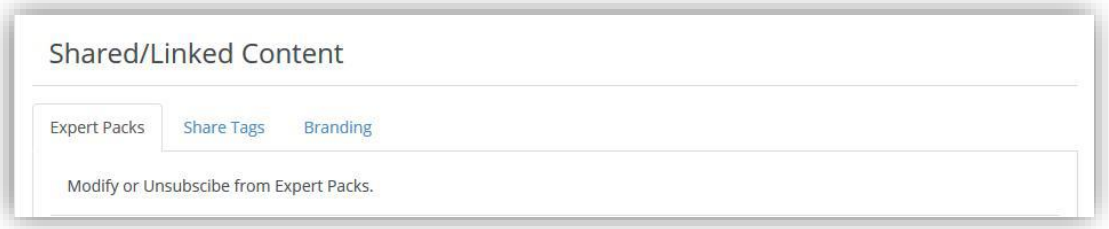
You can set up a rule for all users in your account to reset their passwords at a regular interval, your options are 1 month, 3 months and 6 months. To activate this, select On from the 'Switch' menu and then select one of the options in the 'Interval' menu.



Shared / Linked Content



This is the area of the system where you can set up sharing of certain data with other organisations, e.g. Expert Packs, Tags, etc.



Expert Packs

Expert Pack is a folder that contains templates for various areas, for example, these are Request templates, Survey templates or Document templates. Expert packs are created when converting the request or survey to the template or creating a new document template. There is no limit on how many templates can be added to individual expert packs, SourceDogg, however, recommends to

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create expert packs that would mirror the organisation's internal procedures, e.g. to prepare a template for each of the product category being procured in SourceDogg.

It is also possible for other organisations to share the expert packs with you, allowing you to use the content of their templates.

The expert packs are listed on the page in the alphabetical order by default, but user can sort these by 'Publisher', 'Shared with' or 'Contents' also.

The following information is available about each of the expert packs:

1. **Name** - this is the name of the expert pack, as entered by the user when creating it. This can be changed if needed, click on the 'Edit' button and enter and save the new name.
2. **Publisher -** the name of the organisational that has created this expert pack.
3. **Shared With** - displays the number of users and organisations that this expert pack has been shared with. If this is an only internal expert pack that has not been shared with any other organisation, it will display 'My organisation'.
4. **Contents** - shows the number of templates of each type that are saved in this expert pack. By clicking on the link, this will take you the respective area of the system where the templates can be seen and used.

By clicking on the name of the expert pack, the user opens the details of the folder. Information about the users and organisations this expert pack is shared with are displayed and you can edit these as necessary.

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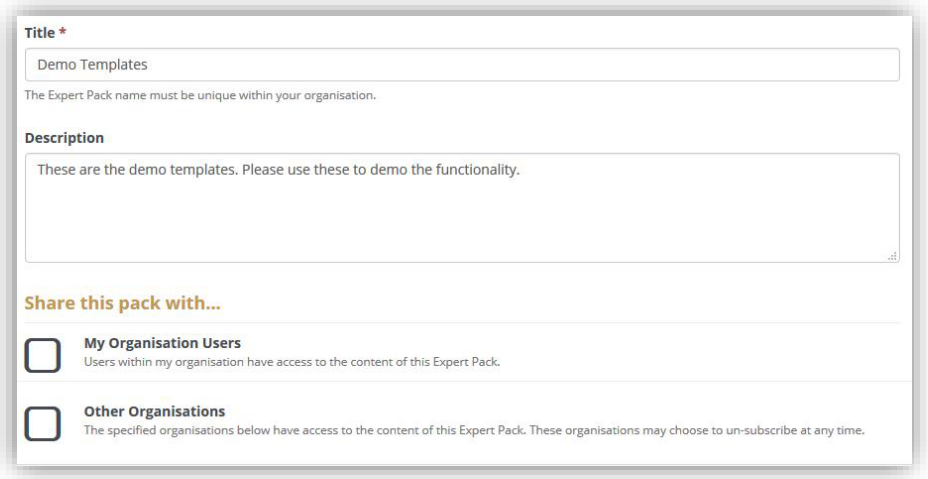
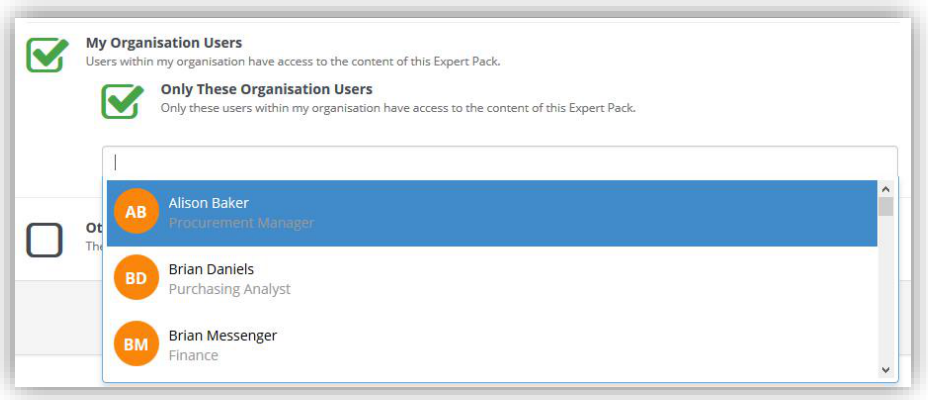


When you click on 'My Organisational Users', you will allow other users in your account to use your expert pack. When this option is selected, any user will have access to templates saved in the expert pack. If you wish, you can consequently limit the availability of the expert pack to selected users only, by selecting 'Only These Organisational Users' and selecting the users from the list. All selected users will have access to the expert pack. The users not in this list will not have access to expert pack.



You can also share the Expert Pack with other organisations using SourceDogg, to activate this functionality select 'Other Organisations' and type their name into the text box. As you enter the text into the box, SourceDogg will search for the organisations with entered name and display these. Once a correct organisation is displayed, click on the text underlined. This organisation will then be added to the list, as on the picture below.

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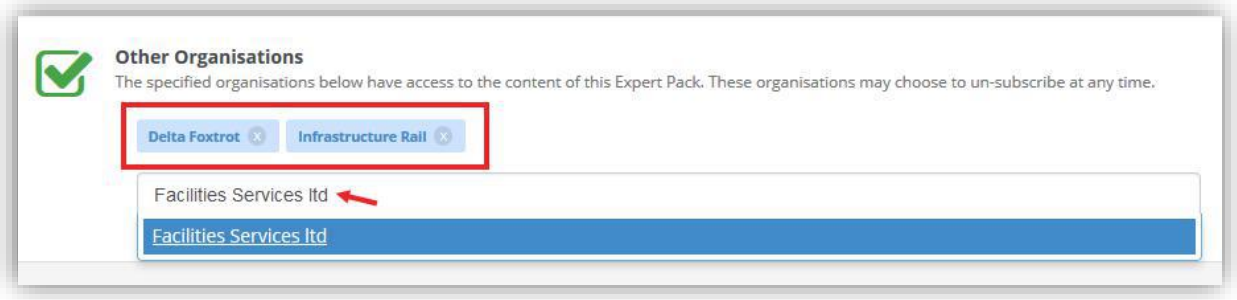
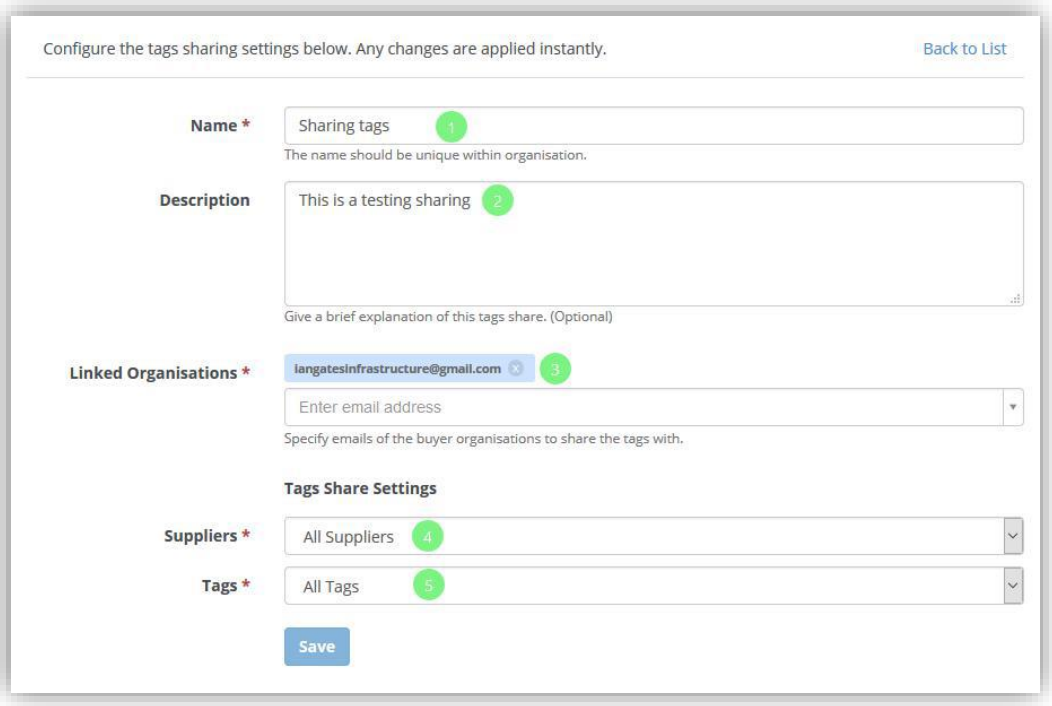


Share tags

Tags are keywords and labels that Buyer can use to categorise their suppliers in SourceDogg. These can be shared with organisations. To set up this functionality, you need to click on 'Share Tags' button to create a new link. The form below will be displayed and you need to provide the following information:



1. **Name -** this is a name of your Share Tags link.
2. **Description** - description of your link. Provide further information and details to your colleagues.
3. **Linked Organisations** - you need to enter the email address of a user associated with the account you want to share tags with. SourceDogg will recognise if this is a valid email.

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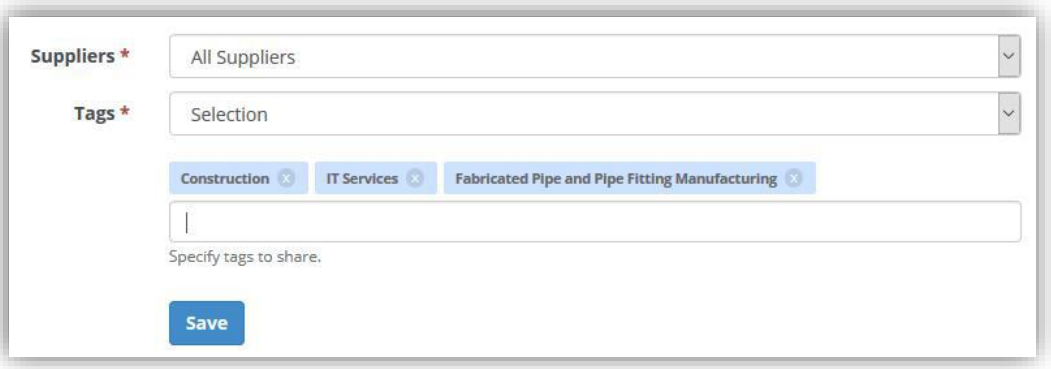
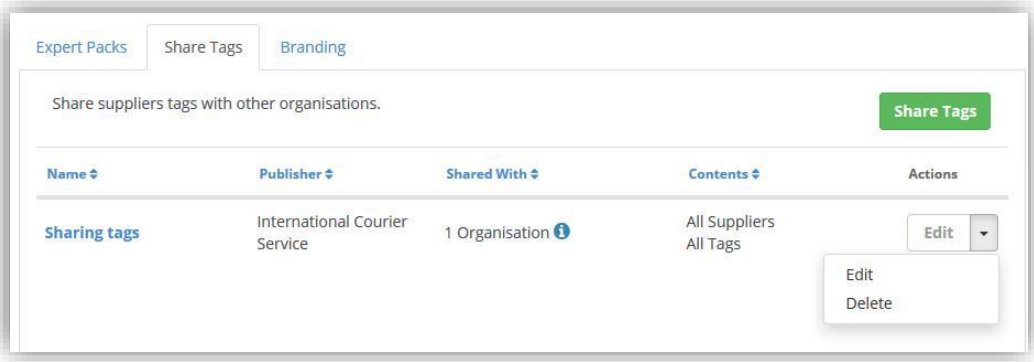
4. **Suppliers** - here you select whether you want to share tags of all your suppliers or only suppliers that you have added to Supplier Pool.
5. **Tags** - you can select whether you share all the tags with other organisation or just a selected subset of your tags.



When a link is set up, you must click the 'Save' button. The organisation you are sharing the tags with must confirm they accept these to be added to their account.

All the links created are listed in the main menu and you can edit the settings of these, e.g. add new emails or change the tags at any stage. You can also delete the link if you do not want to share the tags anymore.



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Request Settings

In this menu, the admin user can set up default options for Requests, Purchase Orders, Scoring and Scoring Scales.

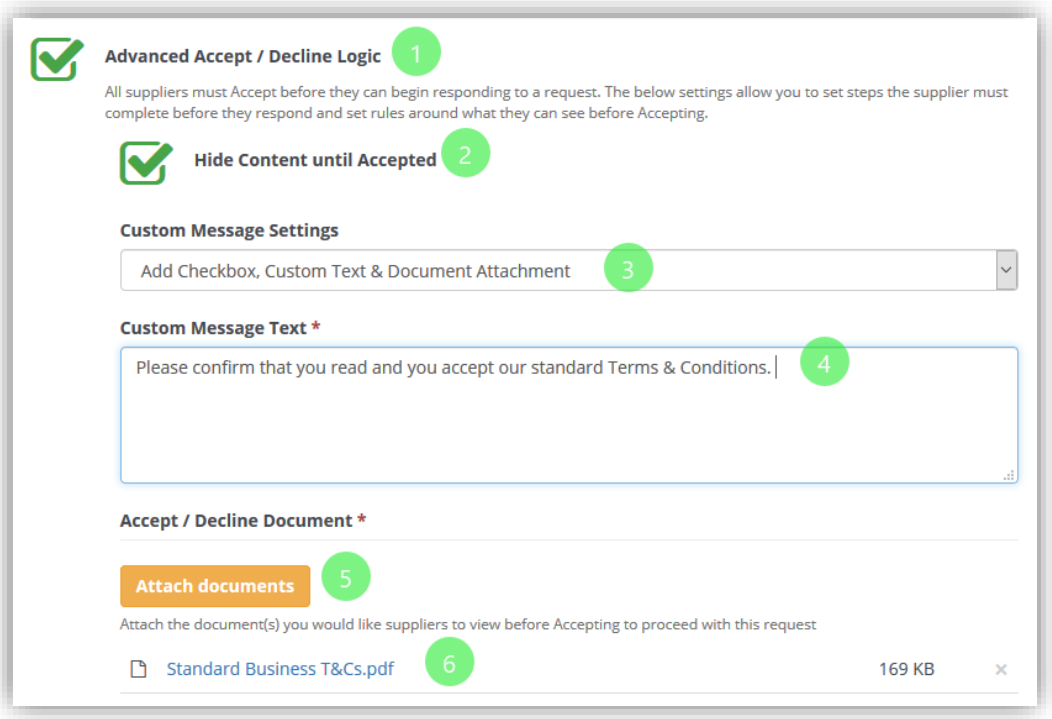
Requests

The Admin of the account can set up a default options that will be used when new request is created for features such as Public Invitations, Approval Requirement, Response Lock, Supplier Q&A or Advanced Accept / Decline.

Advanced Accept / Decline

This option is by default turned off. When activated to “Turn of/off within Each Request”, the request creator will be able to use this feature as necessary.

This feature will allow to request a confirmation of a customised message or agreement to specific document by the supplier prior to accepting the invitation to request. It is also possible to hide the content of the request and associated documents until the request invitation is accepted.



1. **Activate the feature here**. Once selected, the subsequent options will become active. If this option is turned off, it will revert back to “Standard” accept / decline logic

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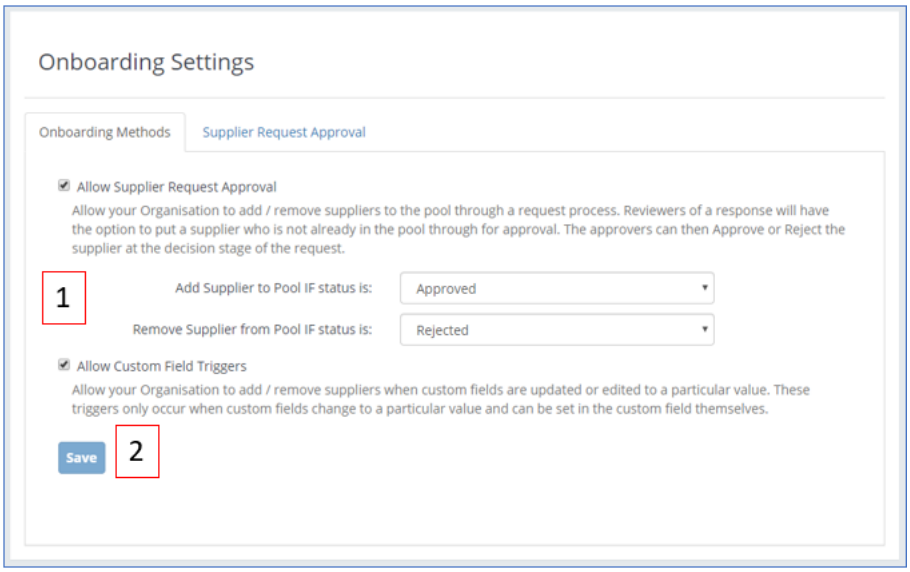
2. **Hide Content until Accepted** – if this option is selected, both the content (questions) and the documents shared with the suppliers are hidden. Suppliers can see the names of the documents, but these cannot be downloaded until the invitation is accepted.
3. **Custom message settings** – two options are available here – *Add Checkbox & Custom Text* OR *Add Checkbox, Custom Text & Document Attachment.* Depending on the option selected, the user can then add document(s).
4. **Custom Message Text** – This will be the text of the message that the supplier must confirm they accept to be able to accept the invitation to the RFx.
5. **Accept / Decline Document** – you can add multiple documents here – you can use the document management area or upload the documents from the local PC.
6. **Document List** – all the documents added will be listed here.

Onboarding Settings

Onboarding Methods

On this first tab you can decide whether or not your organisation can add / remove suppliers to the pool through a request process.



1. Through the dropdown you can set rules that will add suppliers to your supplier pool if they've been Approved / Approved or Approved with exception or removed from your pool if they've been Rejected / Rejected or Approved with exception.
2. When ticking this box, you can add or remove suppliers from your pool when custom fields are updated or edited to a particular value.

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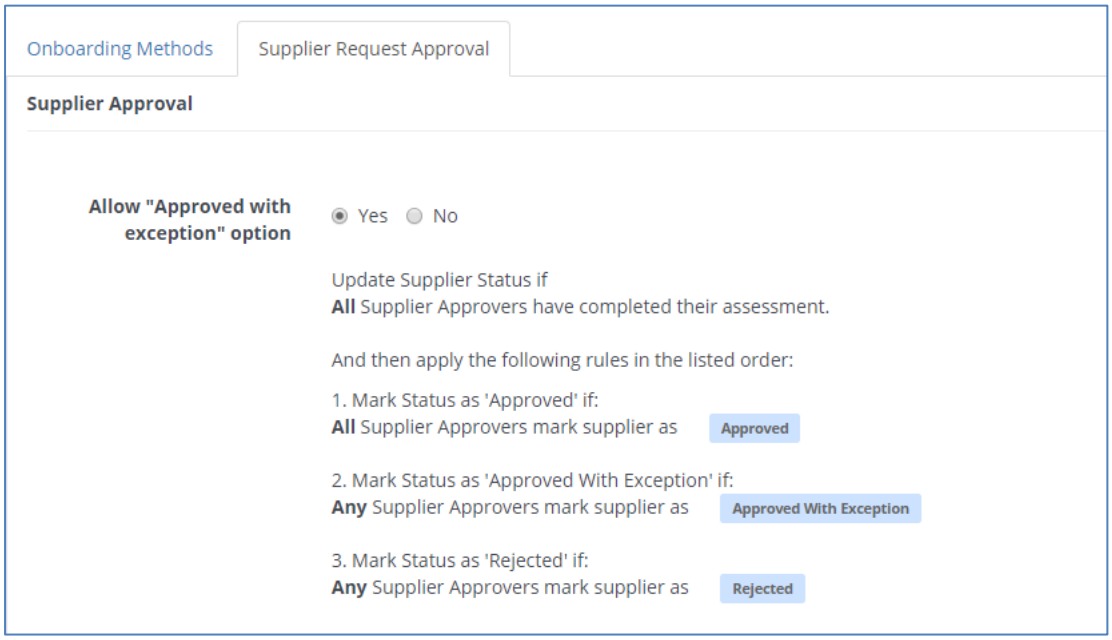
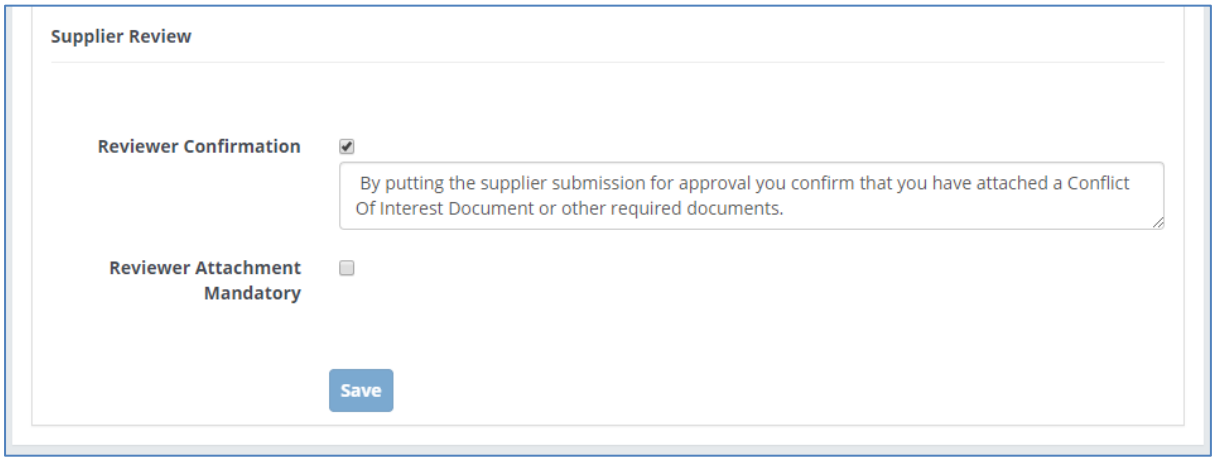
Supplier Request Approval

This tab allows you to switch on/off the 'Approve with exception' function as seen on the previous tab.



On the same tab you can make a customised message and a checkbox and/or an attachment that a user must mandatory when submitting their review.



Manual Pending Approval

This option allows selecting if the supplier response should be automatically put for approval after the response review is completed. If No is selected, the responses are automatically put for approval

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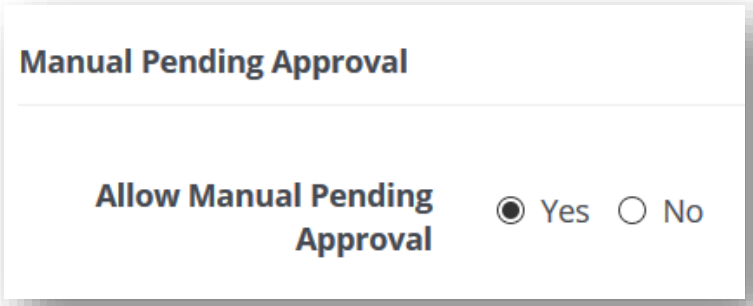
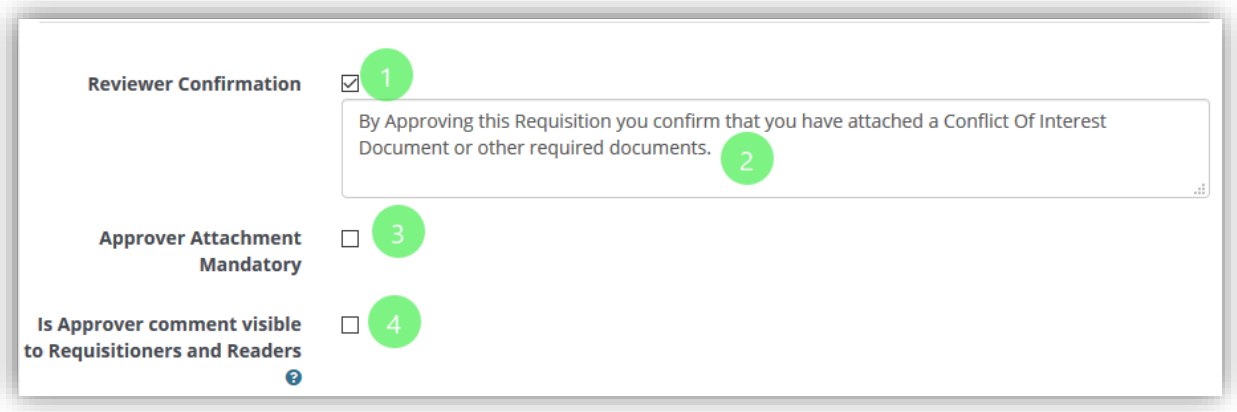
on the hour. If Yes is selected, user must put supplier for approval by clicking on the "Submit for Approval" button once the review is completed.



Requisition Settings

In this section, the reviewers' settings in the requisition module can be set up. There are several options available:



1. **Reviewer Confirmation –** selecting this option will display the customised message and a checkbox that a user must select when submitting their review of a Requisition.
2. **Reviewer Text –** this is a text that is displayed to user, can be fully edited by the admin user.
3. **Approver Attachment Mandatory –** if this option is selected, the Reviewer must add upload a document as part of their review.
4. **Is Approver comment visible to Requisitioners and Readers –** when this option is selected, both Requisitioners and users with the Reader permissions have visibility of the approvers comments.

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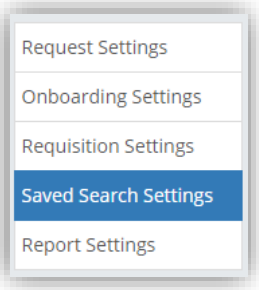
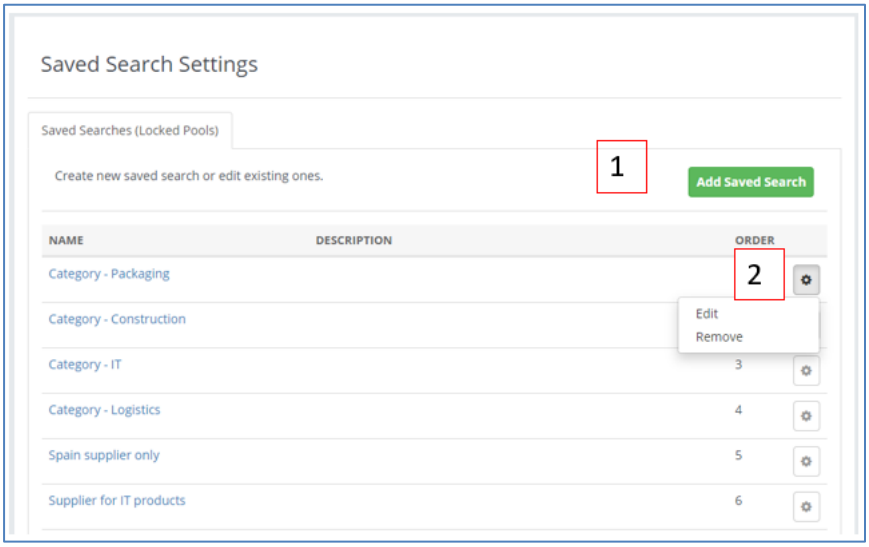
Saved Search Settings

This is where you can set up your organisation's saved searches.





1. To create a new one click on the green 'Add saved search' button.
2. To edit or remove an existing saved search click on the wheel opposite.

Add Saved Search

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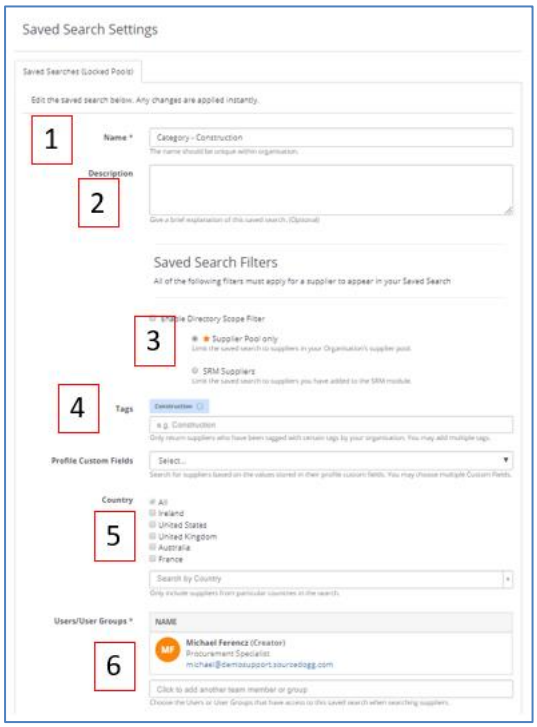

1. The name of the saved search
2. A brief description of the search
3. Enabling a limit on the search to only look at your supplier pool or at SRM suppliers
4. Only return suppliers who have been tagged with defined tags or certain values in a custom field
5. Limiting the search results to certain countries
6. Choosing what users or user groups are to have access to the search

Custom Fields

Custom fields are special fully customisable fields in SourceDogg product where Buying organisations can keep any additional information required. There are three types of custom fields, for various areas of application.

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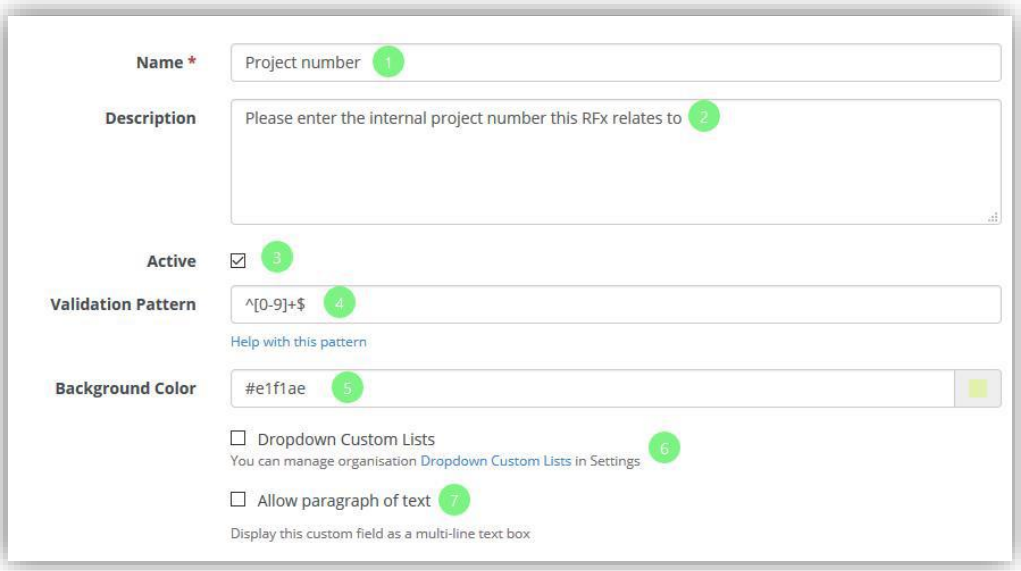
Request Custom Fields

These fields are displayed in the RFx details tab and are generally used to collect and store additional information about the project being published, e.g. project number, budgets, requisitioning department, etc.

Basic settings

When selecting this menu on the left, SourceDogg will display all the existing custom fields. You can edit each of them or change the order in which these appear by drag & drop. To add a new Custom Field, click on the 'Add Custom Field' button.



1. **Name** - enter the name of the custom field.
2. **Description** - enter the description of the custom field. This information will be displayed below the custom field and should explain to your team members what is expected to be entered.
3. **Active** - when selected, the custom field is active, and they will appear in the RFx events.

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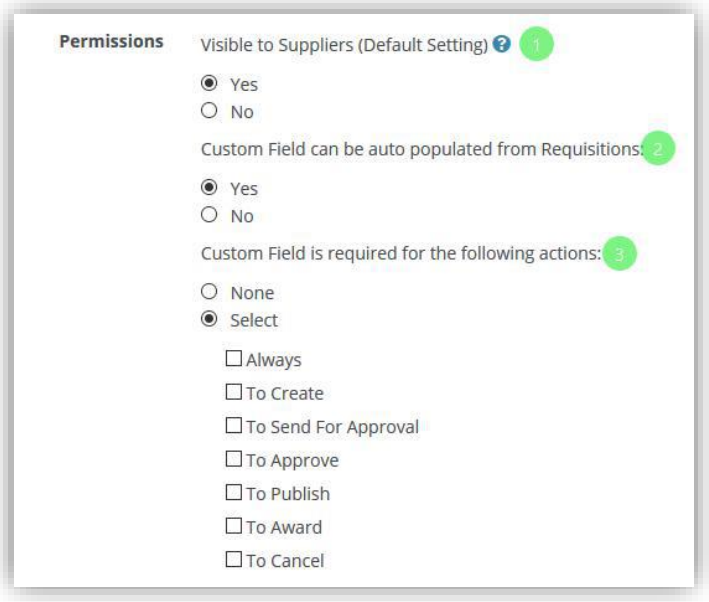
4. **Validation Pattern** - enter the validation pattern if a data in the certain format is expected for this custom field. For further information on custom fields and their settings, please click HERE
5. **Background Colour** - select the colour of the custom field from the colour picker or enter the colour code. This can be useful with a larger quantity of fields when you want to differentiate between them.
6. **Dropdown Custom Lists** - select this option if you want to pre-define the list of values the users must pick from, instead of entering the data in manually.
7. **Allow Paragraph of Text** - this option allows entering a large amount of text into the custom field. Limit of characters entered is increased to 2000.

Permissions

Here you can define the permissions for the individual custom field.



1. **Visible to Suppliers** - determines whether this custom field will be visible to suppliers. This can be set up for individual templates created by the Buying organisations.
2. **Auto-population from Requisitions** - select if you want this custom field to be populated from the Requisitions module.
3. **Custom Field actions** - select for which actions is mandatory to have the custom field filled. Useful to enforce the required information is entered before the action in SourceDogg is performed. E.g. project number must be entered before the request is published.

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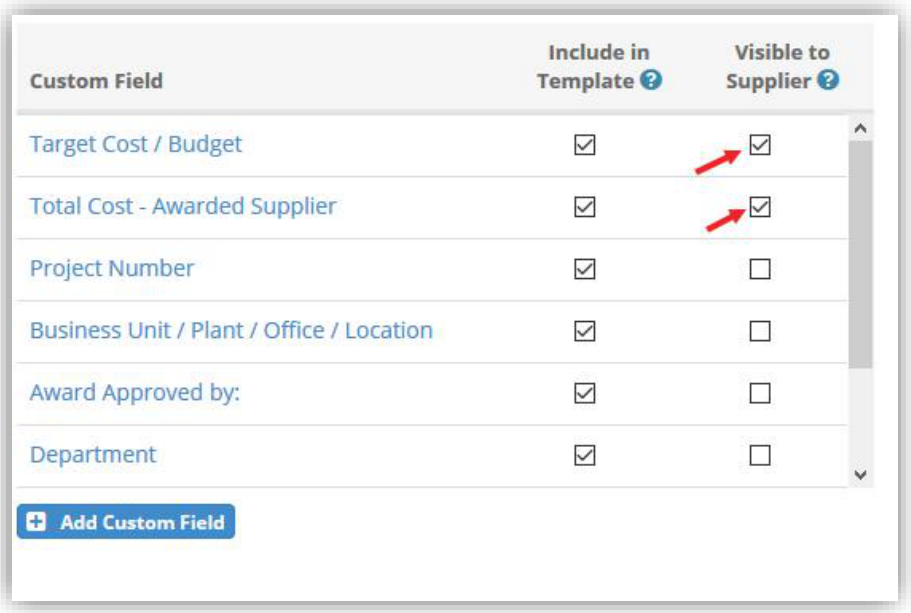
Request custom fields in templates

When creating a template in the RFx module, you can now select that some or all the custom fields would be visible to suppliers.



This is useful when you would like to share some of the information from the form completed by Requisitioner with the Supplier answering your Request. The creator of the template can also select the custom field visibility per each of the templates individually. If at a later stage the template custom fields need editing, admins can do this through the 'Admin Edit' functionality available in the template view.

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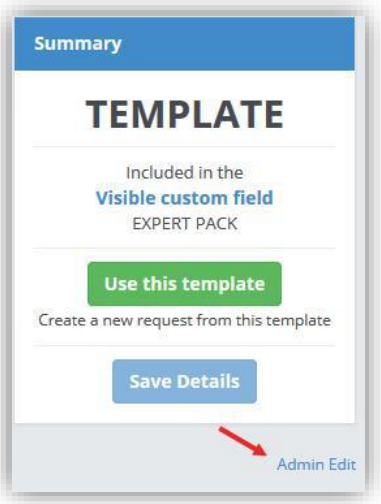
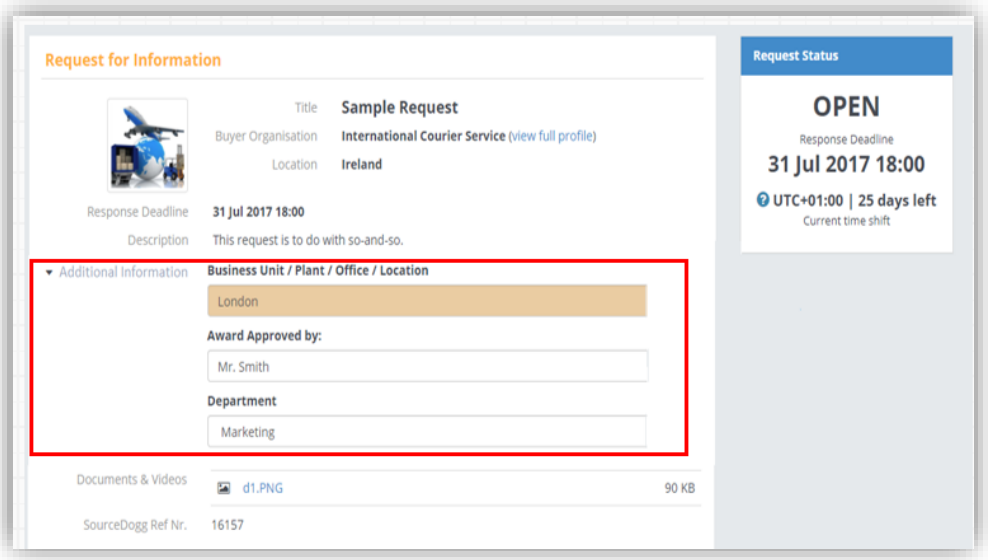


Any requests created from these templates will have the selected custom fields visible to suppliers, along with the rest of the content of the request.



Profile Custom Fields

For more information on Profile Custom Fields, please refer to the 'Supplier Management' User Guide available HERE

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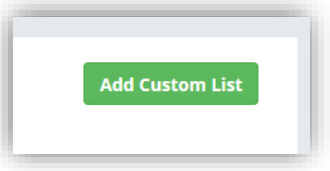
Contract Custom Fields

For more information on the Contract Custom Fields, please refer to the 'Contract Management' User guide available HERE

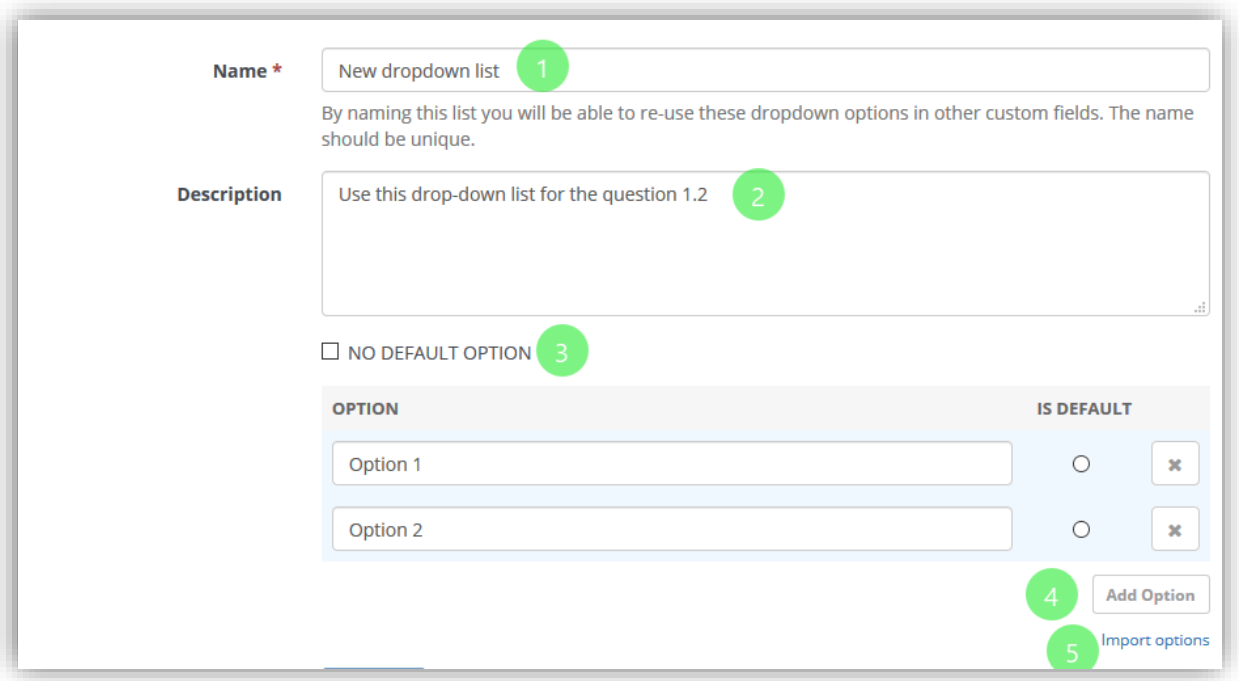
Dropdown Custom Lists

These are custom lists that can be used in other various parts of the system – e.g. in the content of a Request or Requisition as a stand-alone dropdown list question, as part of the dropdown list in the Matrix type question or as an option in the custom fields.

To create a new dropdown list, click on the "Add Custom List" button on the right.



The following information needs to be provided to create a dropdown list.



1. **Name –** this will be the name of your dropdown list. It will be used in other parts of the system, so it should be easy to identify. It is a mandatory field.

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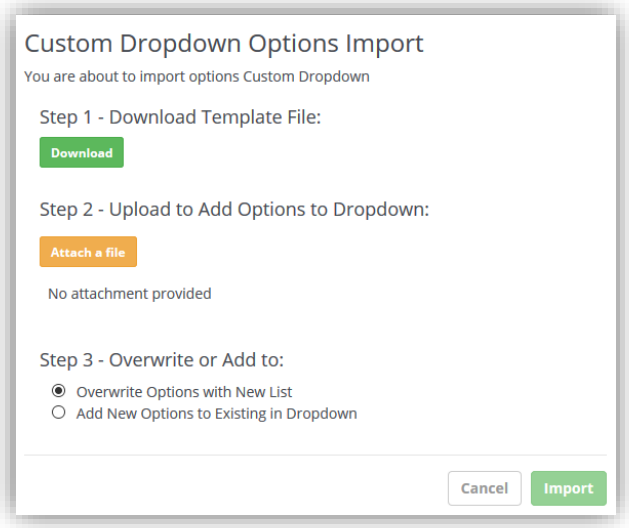
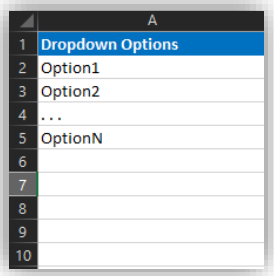
2. **Description –** your description of the dropdown list. This is optional field.
3. **No Default Option –** When this option is selected, there will be no option preselected in the dropdown list.
4. **Add Option –** this is where you add the dropdown list options and you enter the text of the option into the fields. You can add as many options as needed, but please note there is no search options available and therefore consider the practicability of the dropdown list. If needed, you can re-organise the order of options in the list. To do this, move the mouse to the option until it changes to icon. Then, click and drag&drop the option to desired space. You can also make one of the options a default option, it will then be pre-selected in the dropdown lists.
5. **Import Options –** When creating dropdown list with larger number of the options, it might be useful to import these from excel file. To start with this, click on the Import Options button.



As a first step, download the template file. This is a small excel document where you could enter all your dropdown list options.



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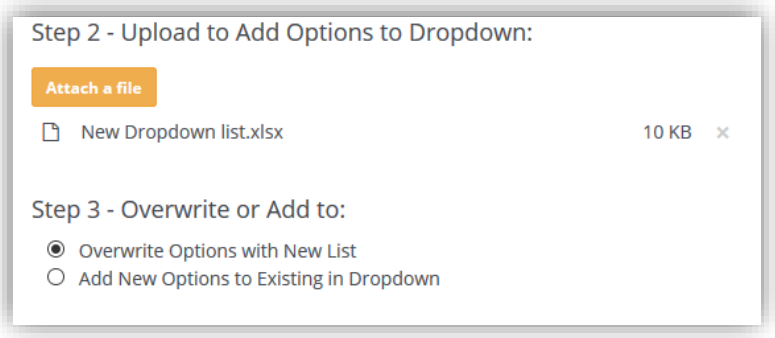
Keep adding your options to the Column A and save the document when done. Then click on the Attach File button and select the document. The file will be uploaded, and its name will be displayed on the screen.

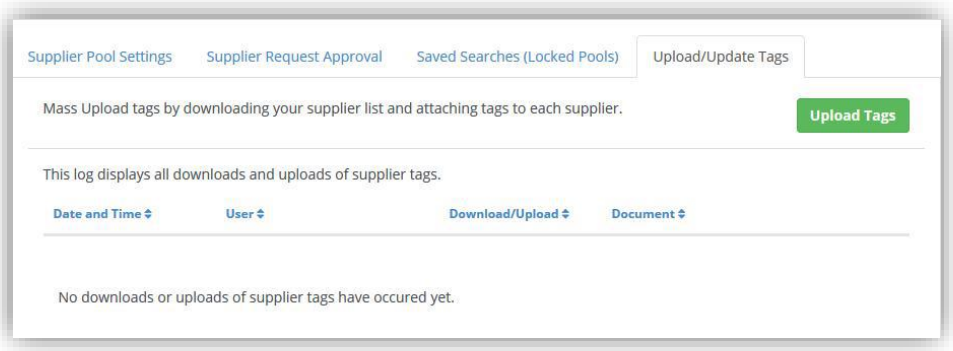


As a last option, you can select whether the list in the document should overwrite the existing options or the option should be added to the existing list. Click on Import button to finish the action.

Batch Updates

Upload / Update Tags

You can use this feature to mass upload or update the tags for your suppliers. To start you need to click on 'Upload Tags'



In step one, you download all the Suppliers and existing Tags, this will export all the suppliers added to your supplier pool.

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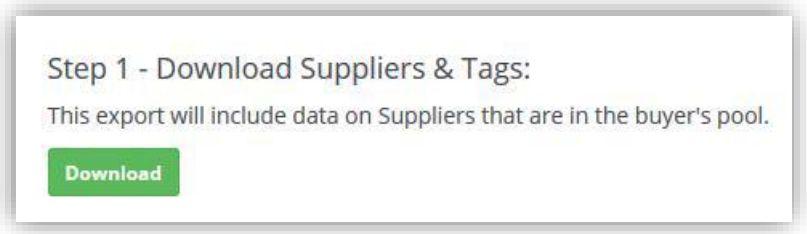
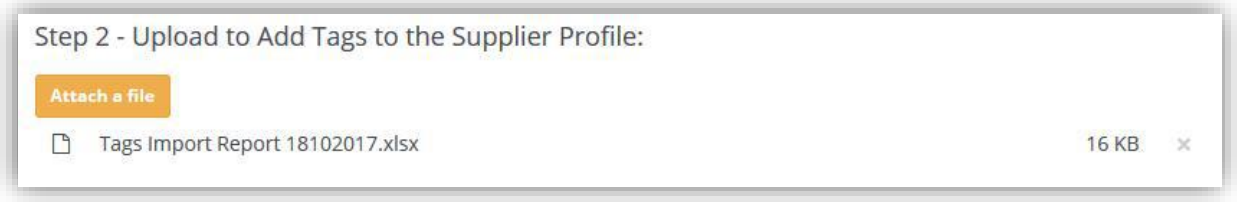


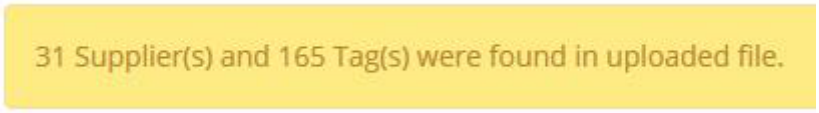
In the excel file downloaded, the tags are listed in separate columns, to add a new tag for the supplier, you need to input the text in the first free column, just as on example below (in yellow):

Supplier ID	Supplier Name	Tags (existing tags are listed. To add a new tag insert it right of the existing tags)		
27391	Acme	approved	ISO: 14001	Pharmaceutical
84067	Advanced Office Supplies	Approved	Stationary	

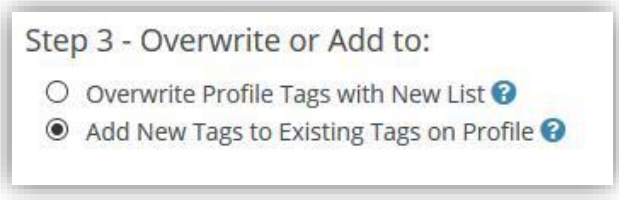
Once you are finished, save the file to your local computer and upload this file to SourceDogg.



The system will analyse the file and display information on the number of suppliers and tags found in the file you attached.



In the final step, you can decide whether you want to overwrite all the existing tags with the new list or just add new tags to existing ones. Select appropriate option and click on 'Upload Tags'



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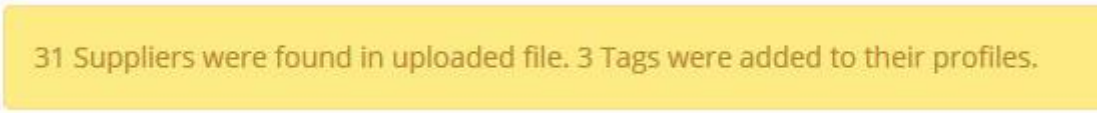
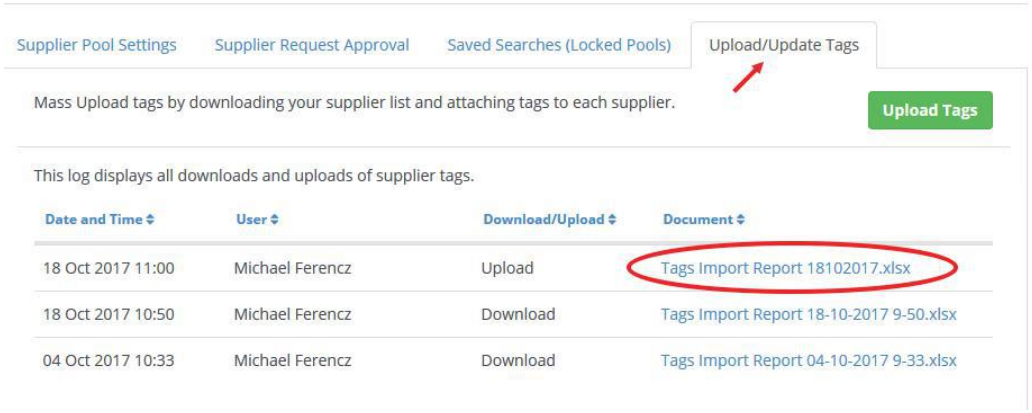
Once processed, SourceDogg will display the summary information for this action.



In the main Upload / Update tags page, the system will display the list of previous actions with the date/time and the name of the user who performed the action. You can also download the excel files that were generated at the time of the action.



Profile Custom Fields

To save time when mass changes need to be made to supplier's custom fields you can upload them in a batch.

Click on 'Choose Fields' to begin the process.

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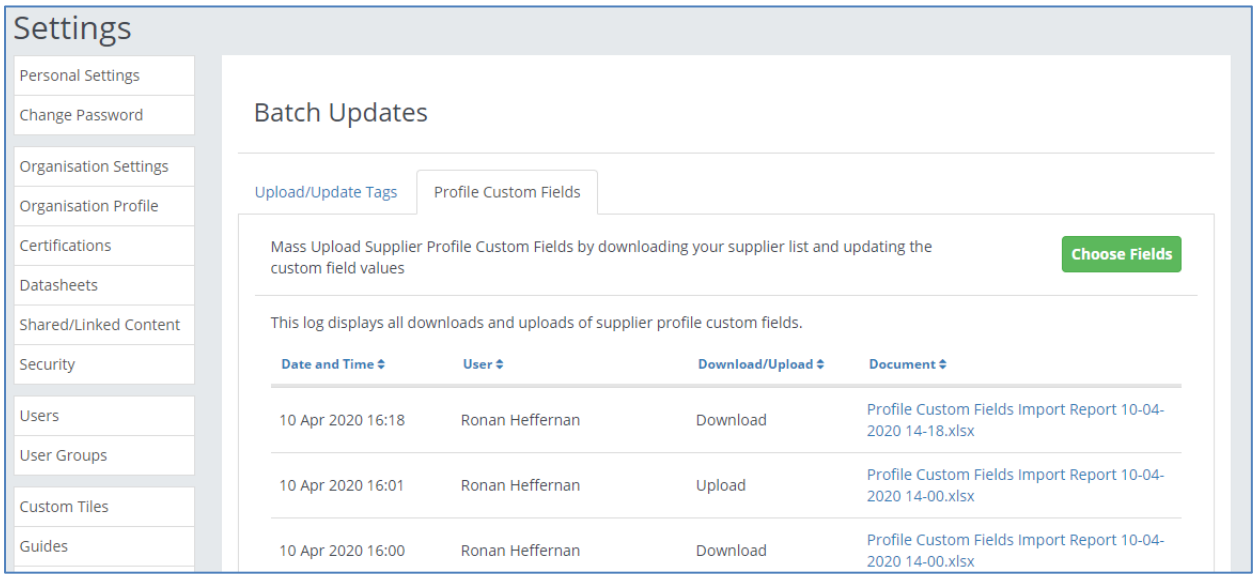

Step 1 - Choose Suppliers & Custom Field

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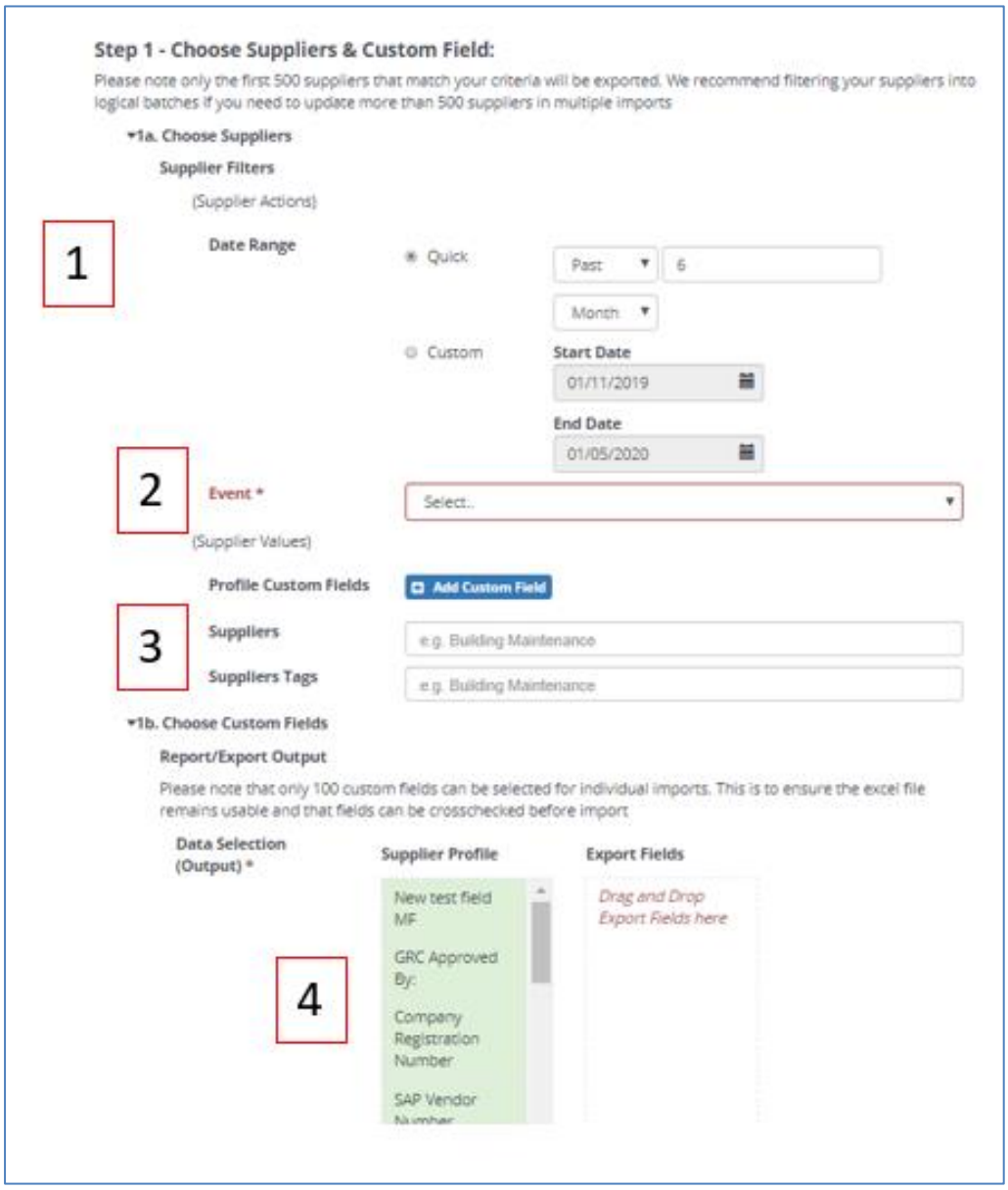

1. Choose the date range
2. Choose the event – this will determine the suppliers that will be added to the export. You can choose from: Supplier Invited, Supplier Accepted, Supplier Submitted, Supplier Declined to Respond, Supplier Awarded, Custom Field Changed, Supplier Approved and Supplier Unsuccessful
3. Enter the supplier names or tags. This will filter the export based on information entered.
4. Choose which custom fields are to be updated by clicking and dragging them from the Supplier Profile column to the Export Fields

Step 2 - Download Suppliers & Custom Field values

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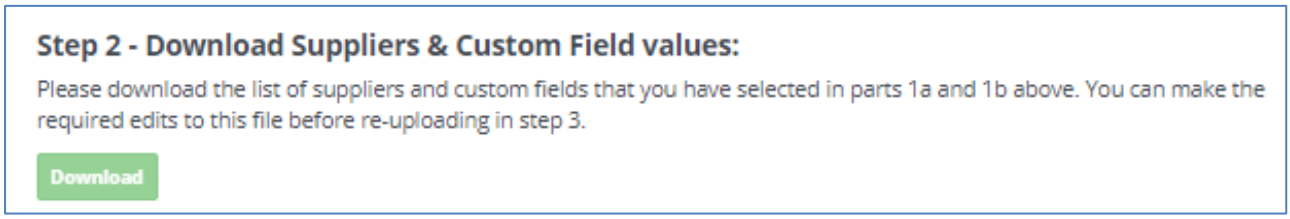
When you have chosen your suppliers and custom fields click on 'Download' to get the file for editing.

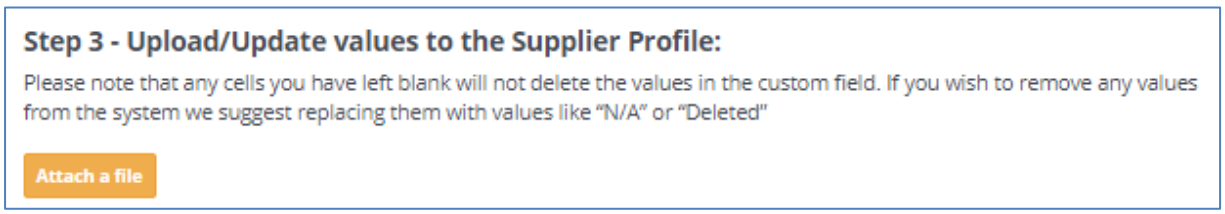


Step 3 - Upload/Update values to the Supplier Profile

Enter the new values into the relevant cells and save the file to your documents.

	A	B	C
1	Supplier ID	Supplier Name	SAP Vendor Number
2			37
3	135	SupplierA	546372
4	136	SupplierB	645272
5	137	SupplierC	635645
6	304	SupplierF	363526
7	413	Diskin Ltd	737373
8	4083	International Courier Service	374645
9			
10			

Attach the file.



Upload the attached file.

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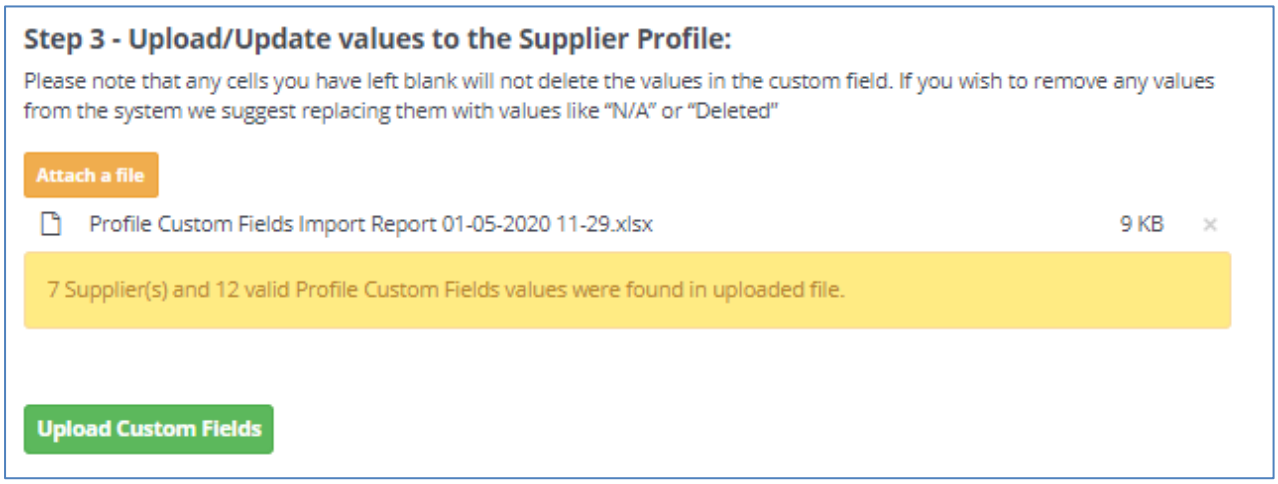
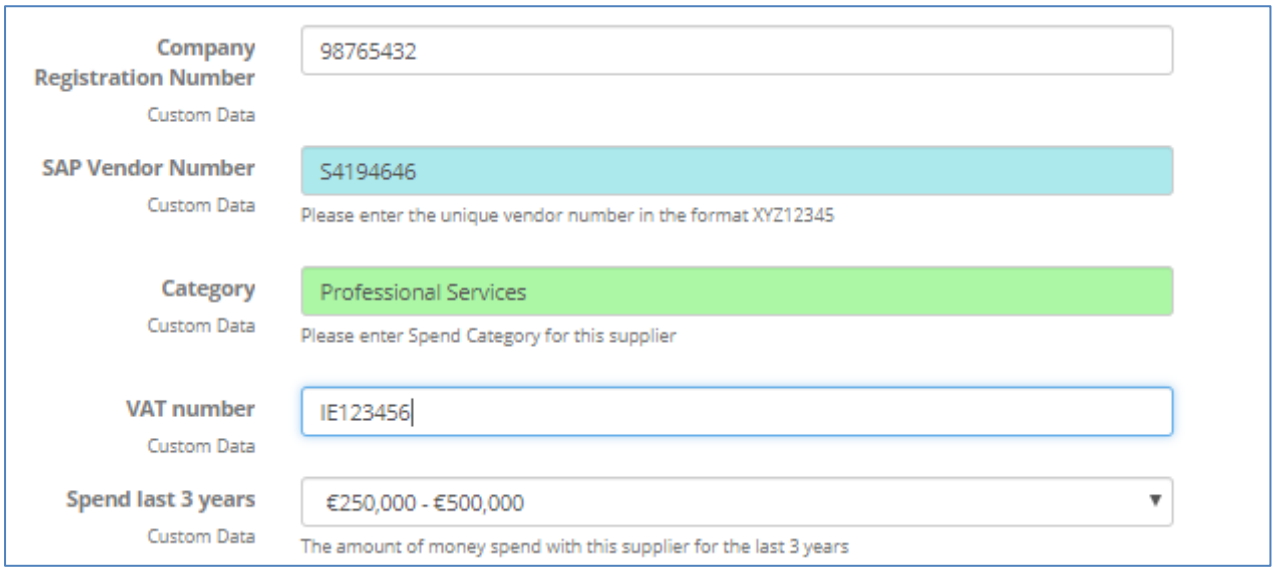


The supplier's profile will then be immediately updated.



Note:

- Where there is a dropdown in a custom field and the updated value is not available, the custom field value will not be changed.
- If there is a blank field on the uploaded file nothing will be updated.

Integration Web Hooks

Webhooks are used to integrate SourceDogg into other systems. To create a new Web hook, click on the 'Create Web Hook' button and enter the data required.

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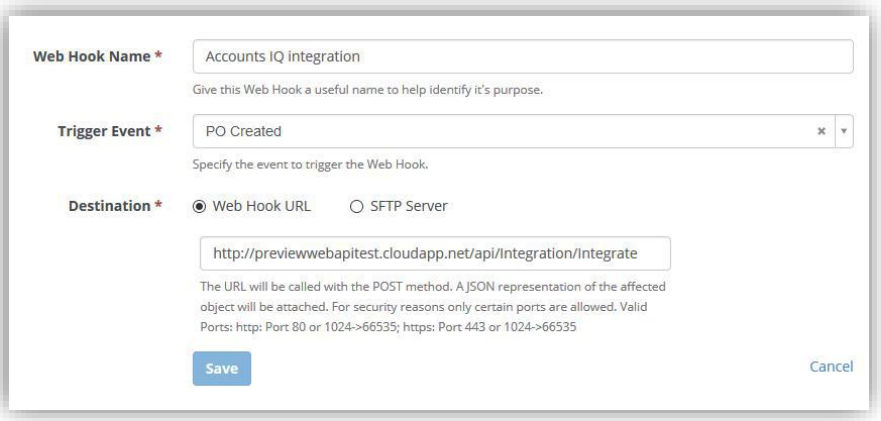
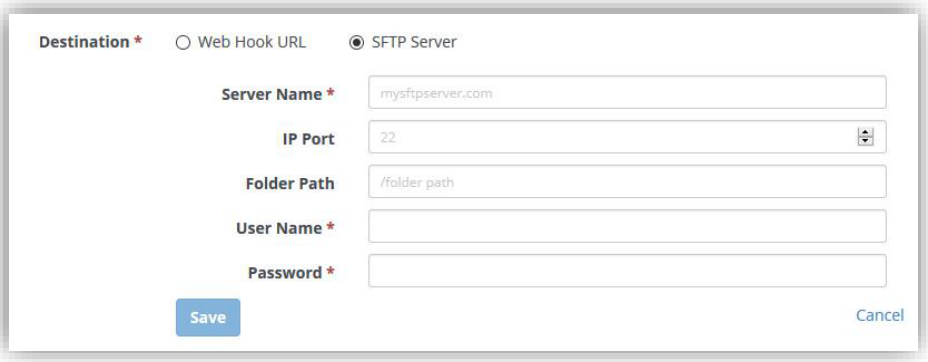


In the 'Trigger Event' you are selecting the action within SourceDogg application that would trigger the webhook to be activated.

As a destination, either the URL link or the SFTP can be selected.



When in the main web hooks menu, application displays all the hooks currently set up, with the details about the system area they relate to, the trigger event and URL.

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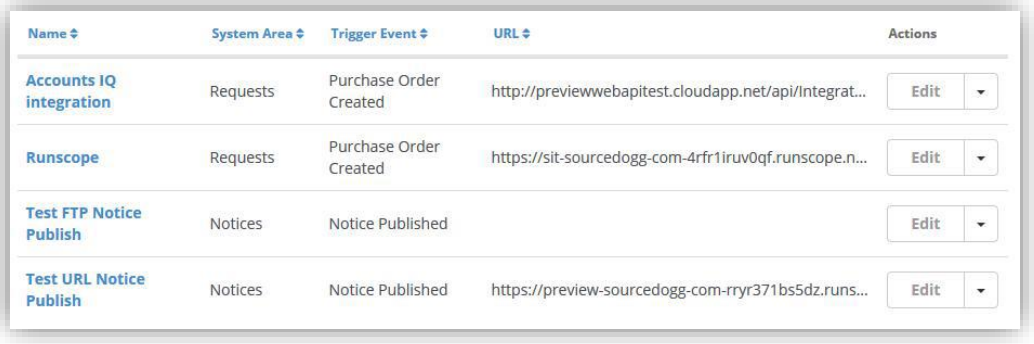

Name	System Area	Trigger Event	URL	Actions
Accounts IQ integration	Requests	Purchase Order Created	http://previewwebapitest.cloudapp.net/api/Integrat...	Edit
Runscope	Requests	Purchase Order Created	https://sit-sourcedogg-com-4rfr1iruv0qf.runscope.n...	Edit
Test FTP Notice Publish	Notices	Notice Published		Edit
Test URL Notice Publish	Notices	Notice Published	https://preview-sourcedogg-com-rryr371bs5dz.runs...	Edit

By using the buttons on the right, you can edit or remove the web hooks from the list.

Please contact Customer Service and ask for Web Hooks guide.

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