User guide

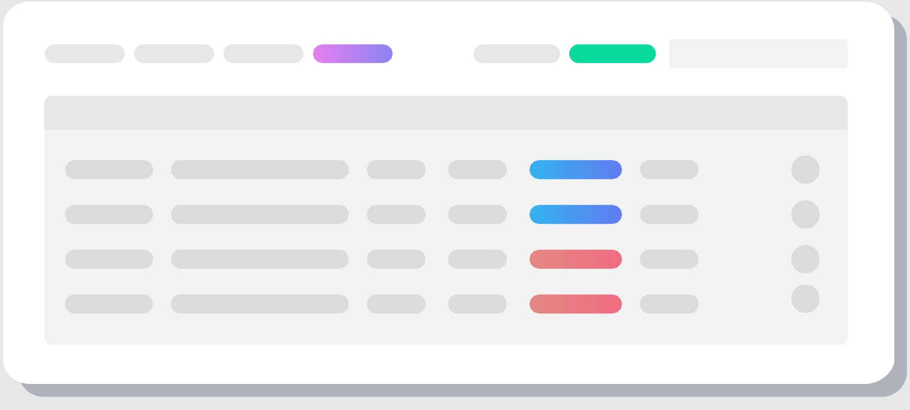
Connections

1 The connections table

The TechPassport Connections Table is the home for all your vendor engagements and is the place for you to download signed contracts and check on the status of your current vendor engagements.

Search connections

Run a free text search to find a particular engagement, and refresh the connections page to renew all connections with the latest updates from suppliers.

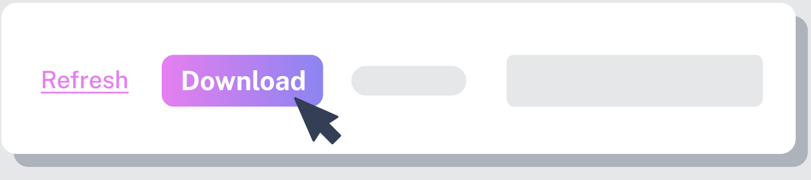


See all connections

By default, you are only able to view the connections started by users within your business group.

To view all connections across the whole organization select the button "All Business Groups" at the top of the page.

You will be able to view connections that users from other business groups have made, but you will not be able to make actions on these negotiations or respond on behalf of someone from a different business unit.



Export data to CSV format

To export this data into a .csv format for reporting, select the "Download CSV" button.

2 Connection status

Status of connections color coding

Your connections are color coded so you can see which stage every connection is in.

- Blue connections show that an action is waiting with a user from your company. Connections you have made that are waiting for super user approval will show as this color.
- Green connections are fully completed, with no further actions left from either side.
- Orange connections are waiting for the supplier to either respond to a negotiation or sign a contract.
- Pink connections mean an action is required from you, such as signing a contract or responding to a negotiation from a supplier.
- Red connections have been rejected by the supplier.

3 Filtering

Filtering

The filters on the top left of the connections table allow you to filter your engagements to only see connections that match those criteria.

Awaiting supplier	Awaiting buyer	Action required	Completed	All
The request is with the supplier	The request is with your organisation	There is an action required from you. To respond, click the clipboard on the right hand side of the chosen POC engagement. This will open the POC module, and allow you to view information directly related to the POC and supplier comments. More regarding POCs can be found in the one-pager on POC.	The contract is signed and completed	

Sorting

You can also sort your connections using the filters at the top of the table, sorting by metrics such as project or supplier name, the user who originated the engagement, and the date the contract was sent to the supplier.

4 Negotiations

The negotiation panel

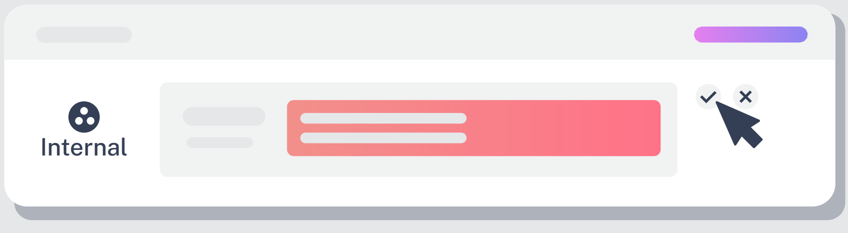
The negotiation panel is where you communicate with suppliers and detail conditions related to a proof of concept trial. You can open this by selecting the small clipboard icon in the last column of the connections table.

The top of the negotiation panel gives you an overview of the engagement. It includes details like the project and product name, as well as showing you how many of the POC fields are completed and how many are still to be agreed upon.

By selecting the tabs on the left you can view information related to a trial. The majority of this information comes directly from the information provided by the vendor when joining the platform. It will give you information crucial to the success of the POC such as the hosting provider, controls around data, and any key licensing information. You will see alerts next to the tab headings, which are color coded so you know at a glance who has an outstanding action for this POC.

Selecting one of these headings on the left will bring up a list of sub-headings. If you have an action in one of these areas, select the sub-tab and view the proposed condition.

- There is an action waiting for you in this section
- You are waiting for a supplier response
- The section is waiting for an internal response
- All conditions in these areas have been agreed, and there are no more actions to take



Internal connections

Some communications are internal-only, allowing you and your colleagues to collaborate and agree on certain conditions before sending to the supplier. You can toggle on and off these internal communications by using the switch on the top right of the page.

To accept a condition in the negotiation module, use the tick next to the condition itself. To reject a condition select the cross. You will then be asked to insert a new condition before a button appears in the top right allowing you to send the negotiation on to one of your colleagues or the supplier.

5 Downloading documents

Signed documents

Once a supplier has signed a POC you will be able to download the contract with the vendor's signature on it. Rather than signing the contract with our DocuSign API, you can download the contract using the PDF icon in the 'connection status' column on the far right side. After having the relevant person from your organisation sign the contract, send it to the vendor manually and then return to the connections table to tick the box stating the contract is fully executed.