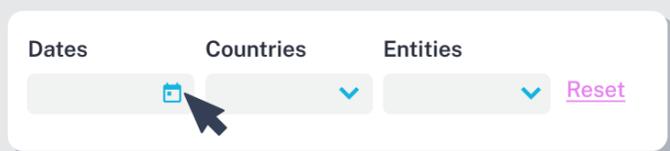TECHPASSPORT

User guide

The TechPassport Dashboard

❶ Using the dashboard

The dashboard is the platform home page, giving you an overview of how you and the rest of your team are using TechPassport.

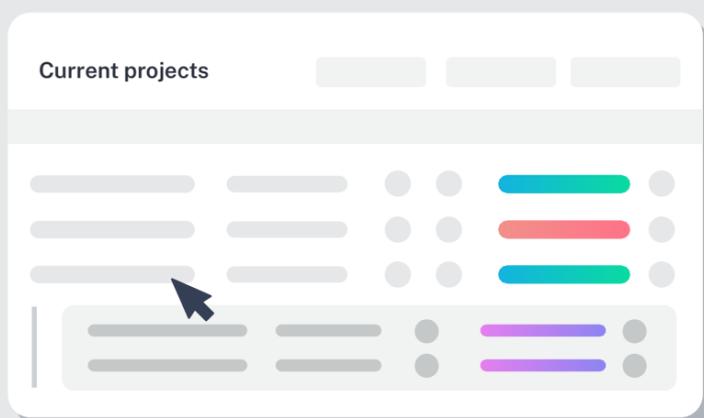| Dates	Countries	Entities	
📅	⌄	⌄	Reset

Filters

The drop down menus on the top left of your dashboard allow you to refine the data being fed into your widgets. You can narrow down this information to only include engagements from a certain time period, geographical location, or business entity.
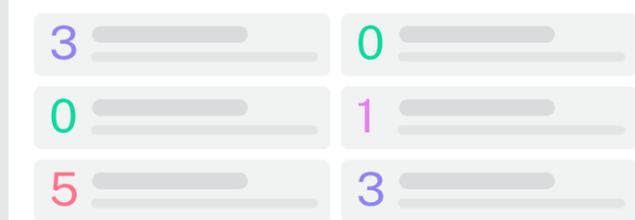
❷ Dashboard widgets

Current projects & POCs

The projects and POCs section provides you with a snapshot of the current engagements you and your team are currently involved in.

Information such as timeframes, number of vendors engaged with and the scope of these engagements are listed. You can click the specific project you are interested in to see more on the individual contracts you are implementing as part of your project.
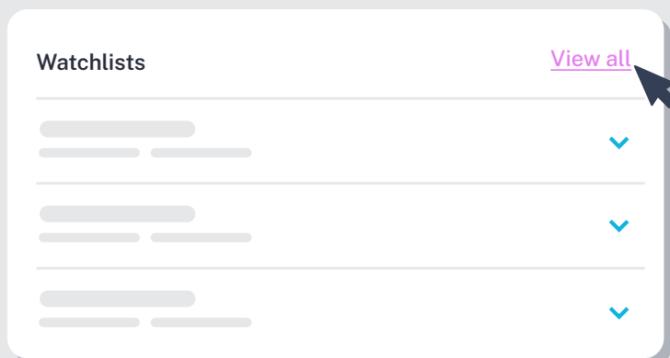

Current projects

Summary

Summary

The summary section gives a high-level view on your vendor comms. This widget will let you know if anyone is waiting on you to action something on the platform, or if you are waiting on any actions from your team members. It will also alert you if any suppliers have been waiting longer than seven days.
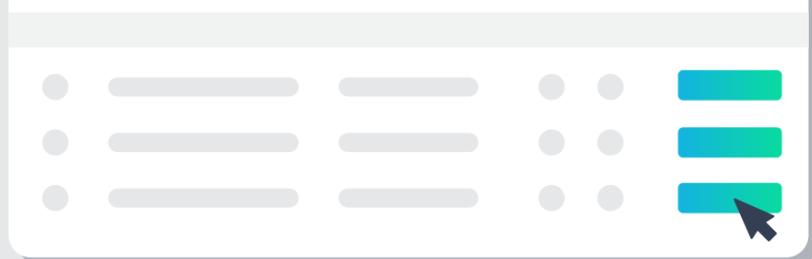
Watchlists

Your watchlists allow you to mark interesting products so you can see when it they are updated or refer to them later. Put suppliers on your watchlists if you are waiting for them to upload more information or if you would like to keep tabs on them for future projects you may have in your pipeline.

➕ Use the plus icon in the watchlist column anywhere on the platform to add a product to your watchlist(s)

◎ Click 'view all' or navigate to the watchlist area of the platform to see all of your watchlists in one place

Watchlists   View all

New products

New products   View all

The new products section contains a feed on the latest products suppliers have added to the platform in the past 28 days. You can view some information on these products and suppliers, or add them directly to a watchlist.
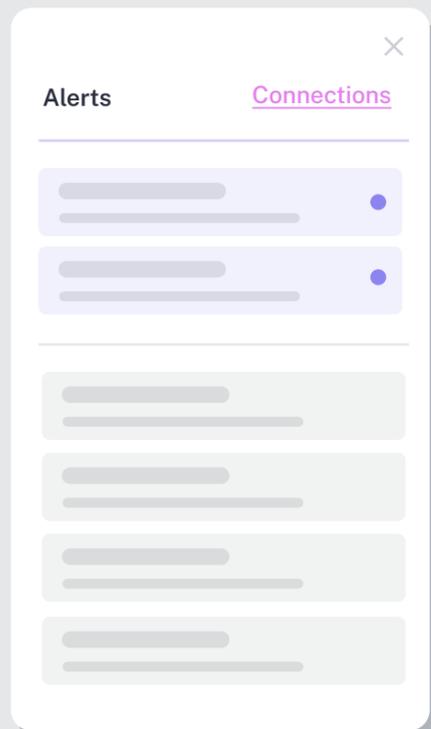
❸ Notifications

Notifications from TechPassport are sent by email and viewable in the alerts panel on the dashboard. You can also see details about current engagements in the connections area of the platform.

Alerts panel

The alerts panel details any recent contractual updates you may need to be aware of. They are divided into your latest alerts (since you last logged in to the platform) and older alerts (which you may have already been alerted to but haven't yet actioned). Use this as an area to manage your time and comms with the vendors you are hoping to contract with.

Alerts could include:
- PoC request accepted
- NDA signed
- Request information responded to

Alerts   Connections

Invited supplier notifications   ★ NEW FEATURE

When a supplier you have invited to TechPassport has successfully onboarded, you will receive a notification in your alerts panel. This includes a link to the new supplier product so you can easily view its details and request an NDA or POC directly in the platform.