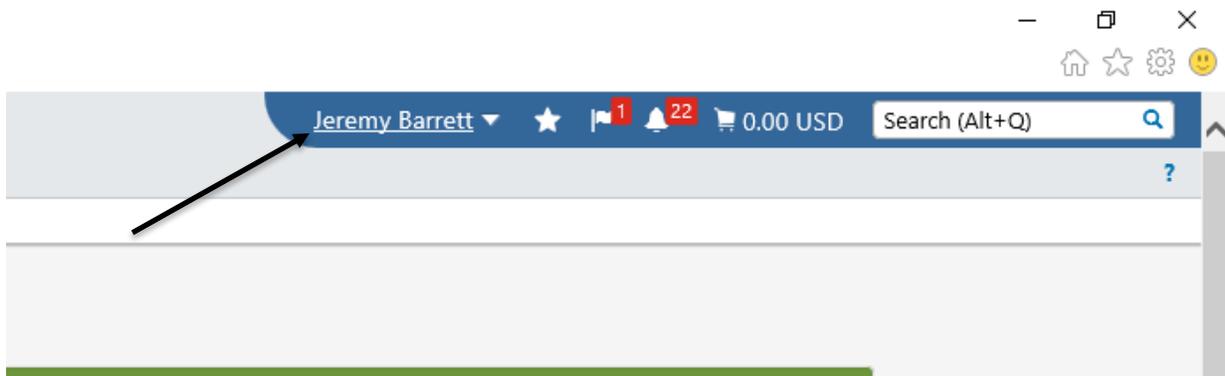




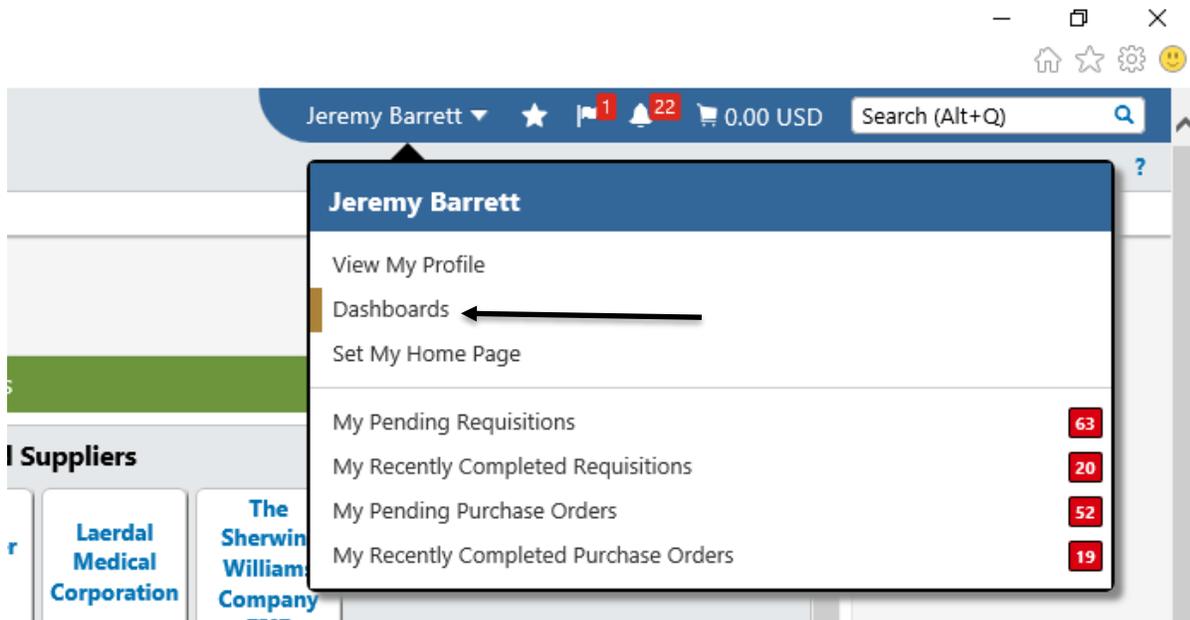
Creating Personal Dashboards in BearKatBuy

This training guide will assist you with creating a personal Dashboard. A personal Dashboard will allow you to have everything you use on a regular basis together on one page, and may be set as your personal home page.

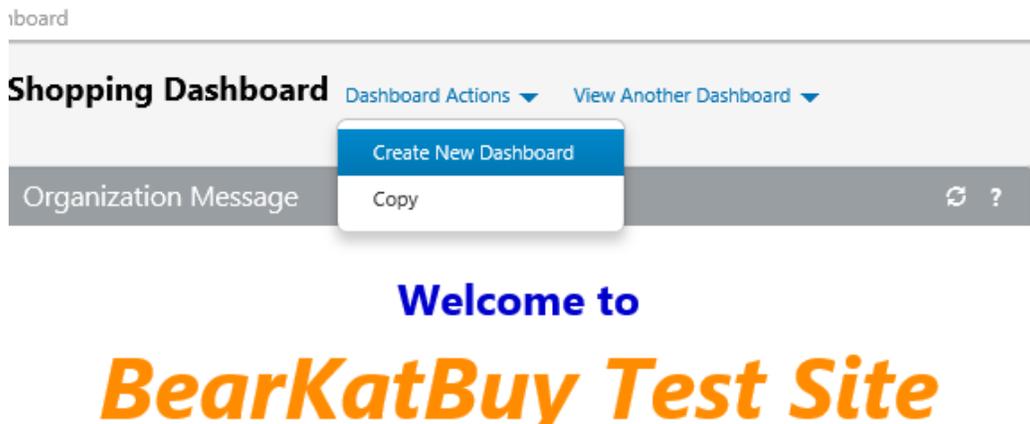
1. Click on your name in the upper right corner.



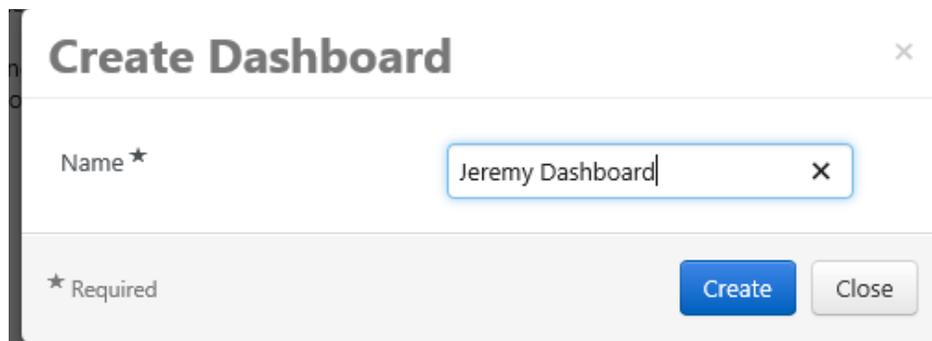
2. Click on Dashboards.



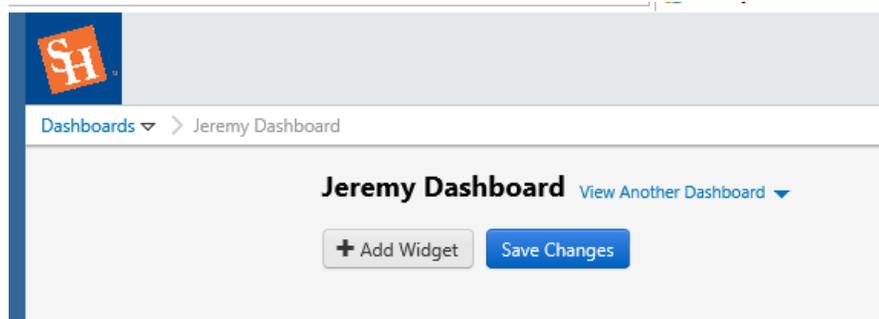
- The Dashboard that displays will depend on your roles. Click on *Dashboard Actions* then *Create New Dashboard* to begin the process.



- Name your Dashboard and click on the blue *Create* button.



- Now choose what content you would like displayed on your Dashboard by choosing *Add Widget*.



6. The box that pops up will allow you to select which widgets to add. There is a brief description below the name of the widget. The widgets displayed are dependent on your assigned role in BearKatBuy, so you may not see all of the widgets below depending on your role in BearKatBuy. Click on the blue *Add* button to add a widget to your Dashboard. Some of the widgets are customizable, while others will just display preset information.

Add Widget ×

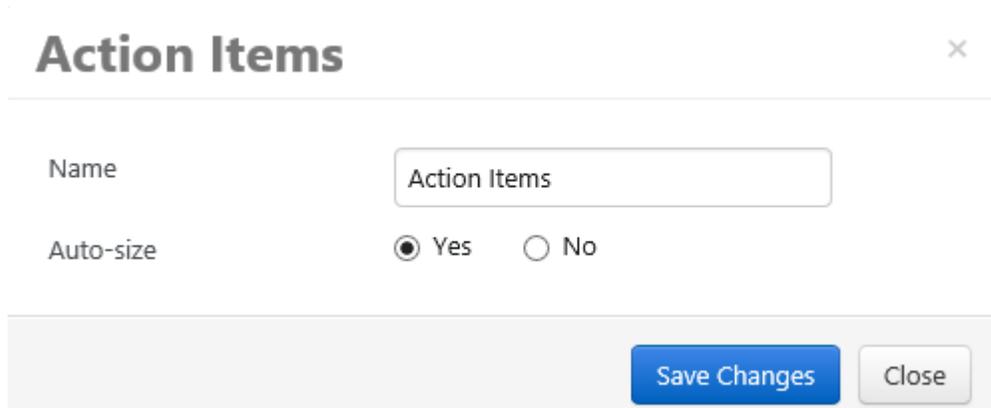
Widget Category

Widget Type	
Action Items List of user's action items.	Add...
Approvals Overview of documents that are available to approve.	Add...
Bookmarks List of user's bookmarks.	Add...
Contract Alerts Overview of upcoming contract activities.	Add...
Contract Search Search utility for contracts	Add...
Contract Summary Overview of contracts broken down by Contract Manager, Contract Type, etc.	Add...
Create Invoice Utility to create invoices	Add...
Document Search Search utility for documents with related shortcuts. Saved searches supported.	Add...
Draft Carts A table of the most recent draft carts.	Add...
Forms Customizable list of forms for easy access.	Add...

1-10 of 28 Results ◀ ▶ 10 Per Page ▲

[Close](#)

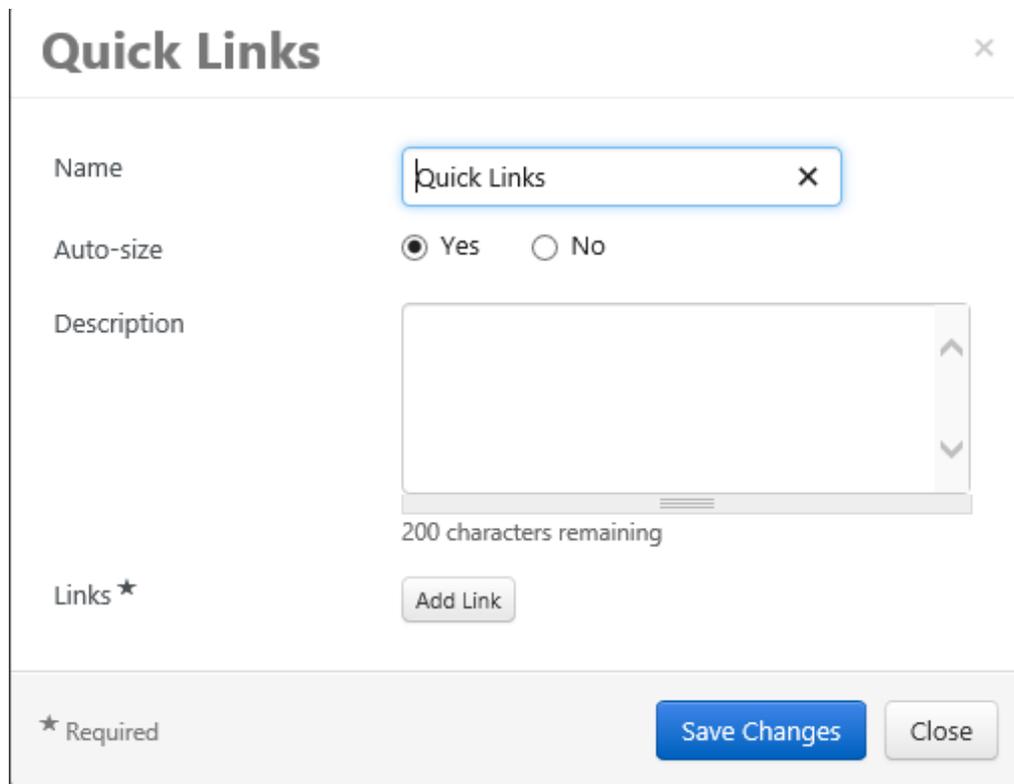
7. The following screenshot shows a widget where the only options are to rename the widget or whether the widget should be auto-sized or not. Selecting no for the auto-size will allow you to change the size of the widget on your screen to achieve the layout you desire.



The screenshot shows a dialog box titled "Action Items" with a close button (X) in the top right corner. The dialog contains two main sections: "Name" and "Auto-size". The "Name" section has a text input field containing "Action Items". The "Auto-size" section has two radio buttons: "Yes" (which is selected) and "No". At the bottom right of the dialog, there are two buttons: "Save Changes" (in blue) and "Close" (in grey).

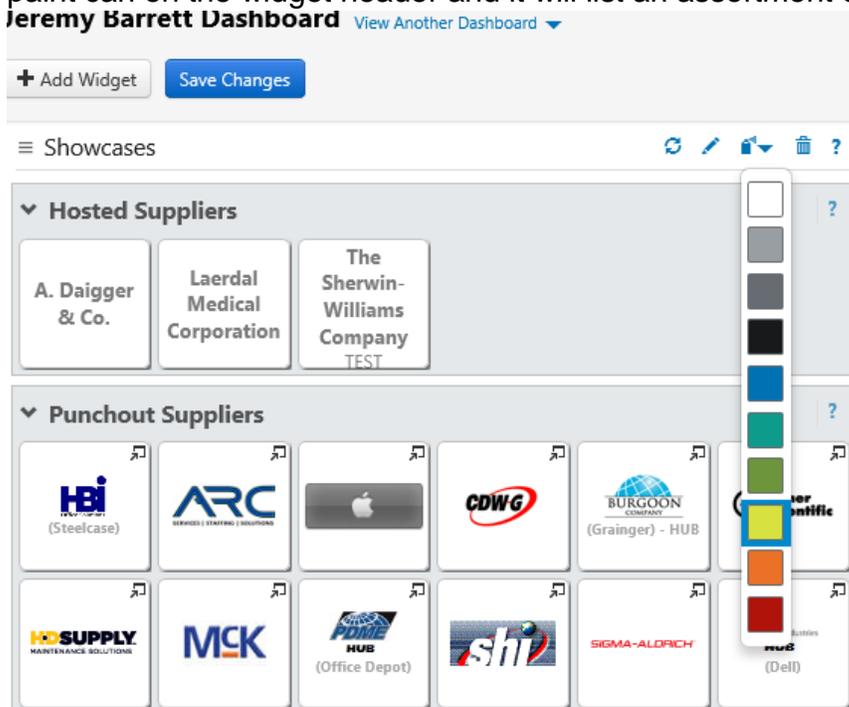
8. Widgets that are set to *No* in the *Auto-size* field may also be resized by clicking and dragging the bottom right corner of the box. When choosing the Organization Message and the Showcases widgets they will need to be put side by side and not on top of each other. The Organization Message widget will take up the room needed to show the entirety of what is on the current message page.

9. The following widget is customizable. Quick Links is customizable where you can choose links/websites that you use frequently and have them readily available.



The screenshot shows a dialog box titled "Quick Links" with a close button (X) in the top right corner. The dialog contains three main sections: "Name", "Auto-size", and "Description". The "Name" section has a text input field containing "Quick Links" with a clear button (X) on the right. The "Auto-size" section has two radio buttons: "Yes" (which is selected) and "No". The "Description" section has a text area with a vertical scrollbar and a character count indicator below it that reads "200 characters remaining". Below the description field, there is a section labeled "Links" with a star icon and an "Add Link" button. At the bottom left of the dialog, there is a star icon followed by the text "Required". At the bottom right, there are two buttons: "Save Changes" (in blue) and "Close" (in grey).

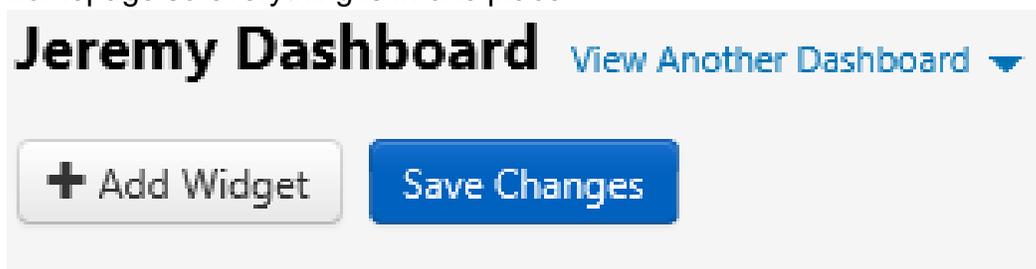
- Once the widgets are on the Dashboard, you can organize the widgets by importance by dragging and dropping them to reorder. To do this, simply hover over the header on the widget and you can drag and drop them to the location you desire on the Dashboard.
- The header color for each widget may be customized as well. Simply click on the paint can on the widget header and it will list an assortment of available colors.



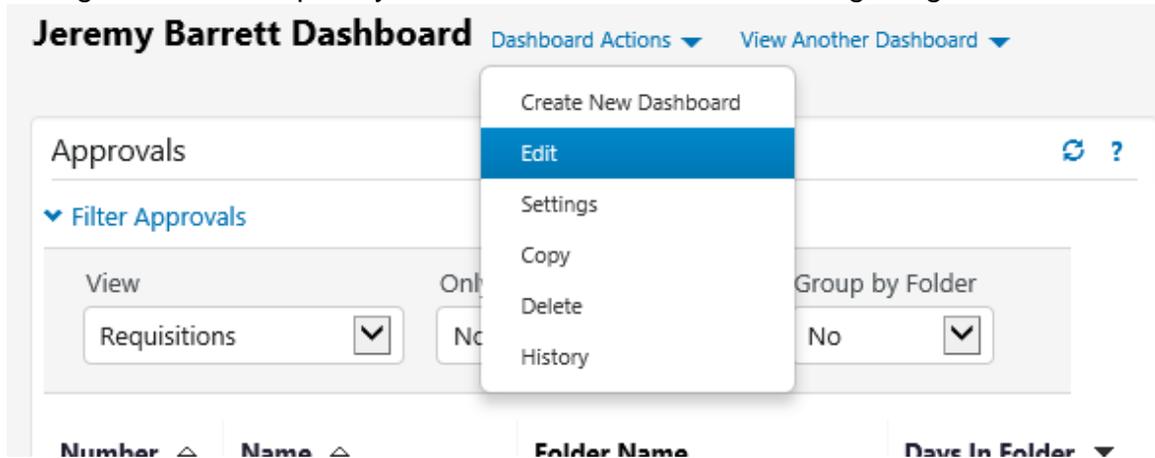
- The Widgets that are highly suggested to have on each users Dashboard are the following:
 - Organization Message
 - Showcase
 - Document Search

Note: The Create Invoice widget allows users to create receipts, not invoices. This is an out of the box widget name from Jaggaer that may not be edited by SHSU.

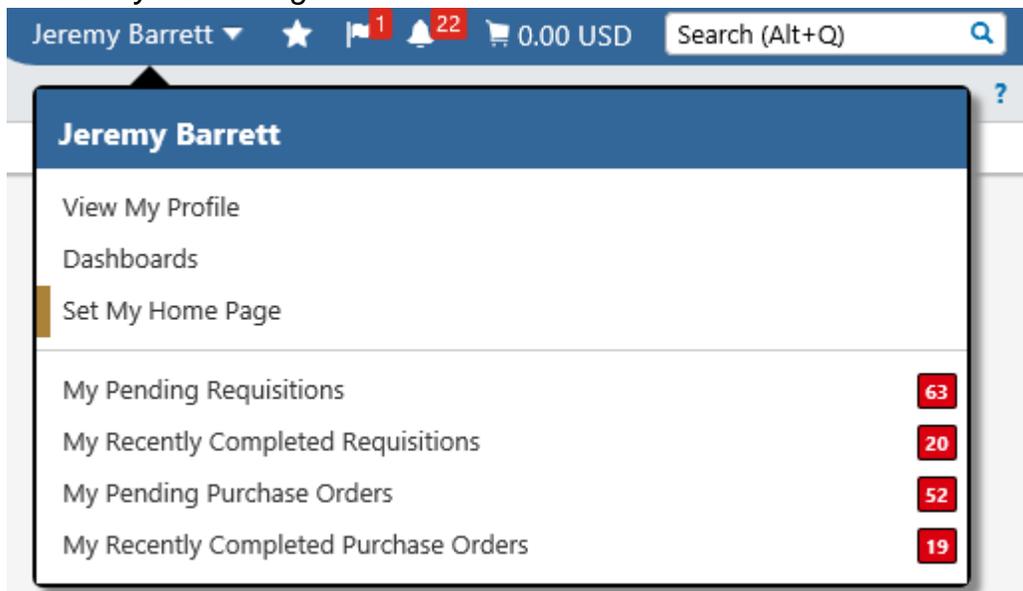
- After everything is organized, you may save your changes by clicking on the blue *Save Changes* button. This will allow you to set your Dashboard as your homepage so everything is in one place.



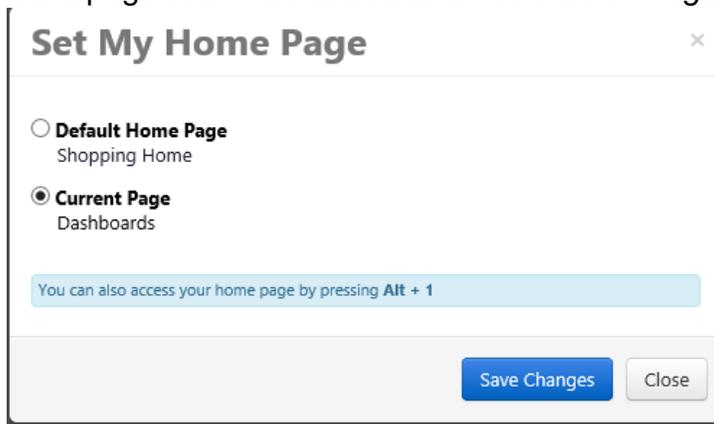
14. If you would like to go back and make changes after you have saved the Dashboard, go to the Dashboard Actions dropdown beside the Dashboard name and choose the Edit option. This will open the Dashboard up for additional changes. Once complete you will need to select Save Changes again.



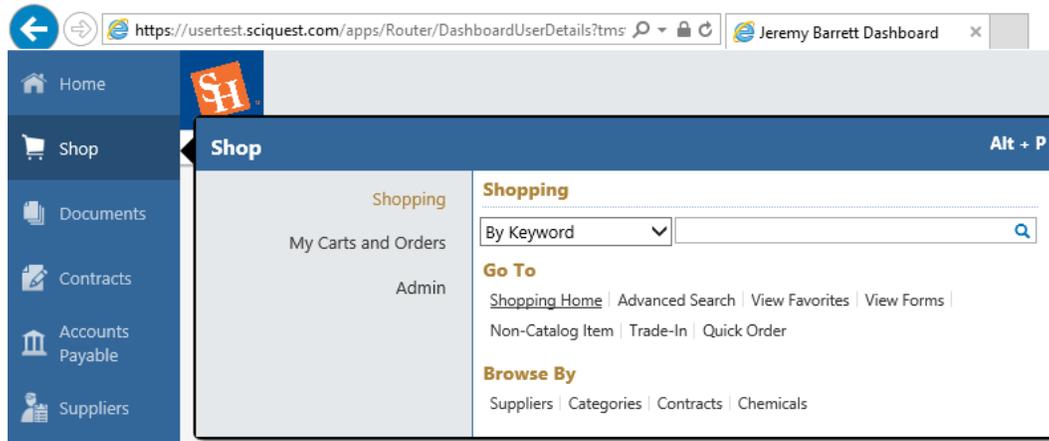
15. To set your homepage, click on your name at the top of the screen and then click on *Set My Home Page*.



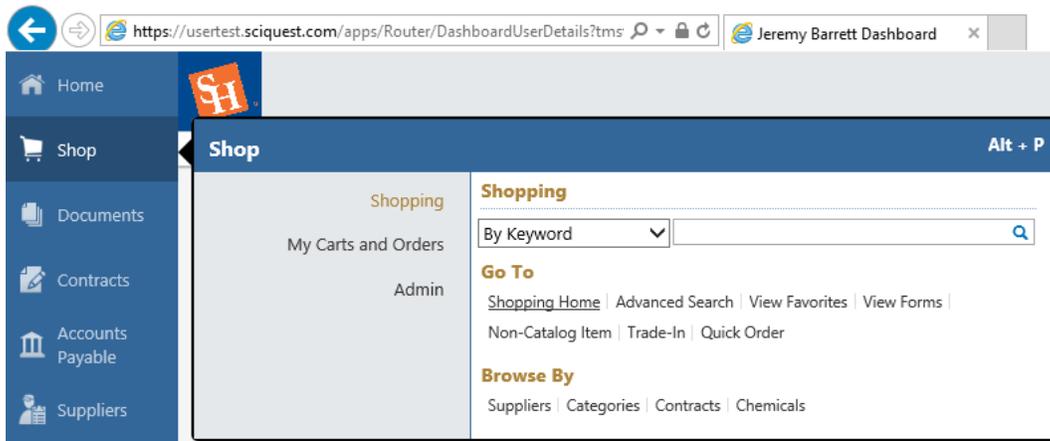
16. A pop up box will appear as shown below. To set your new Dashboard as your homepage select the radio button for *Current Page*. Then click on *Save Changes*.



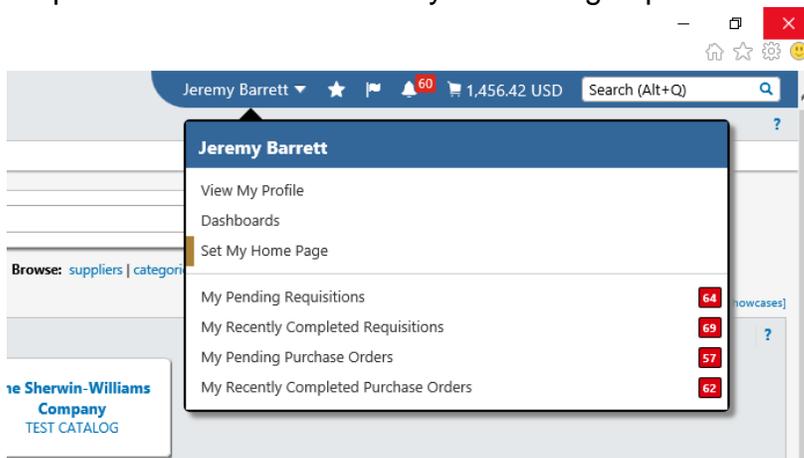
17. You can return to the original Dashboard at any time by clicking on the *Shop* button (Shopping Cart Icon) on the left hand side of the screen and clicking on the *Shopping Home* link under *Go To*.



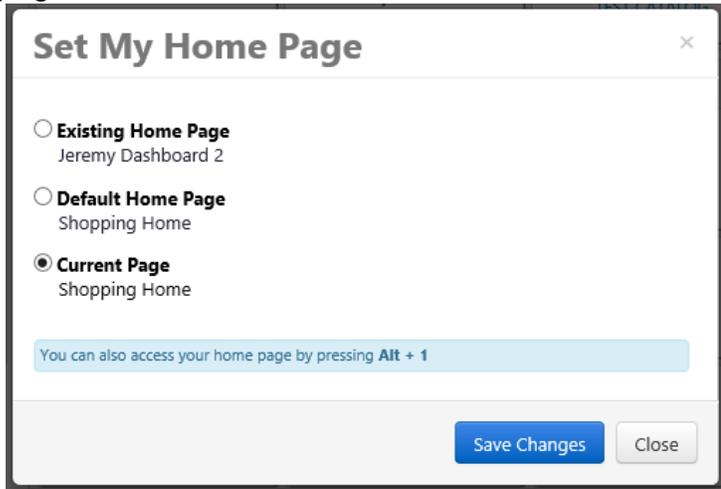
18. If you do not like the new Dashboard options once you create it and want to default the homepage to the original Dashboard simply go to the *Shop* button (Shopping Cart Icon) on the left hand side of the screen and click on the *Shipping Home* link under *Go To*.



19. Once you are on the original Dashboard, go up to your name and click on the dropdown. Click on the Set My Home Page option.



20. A pop up box will appear. Ensure the Current Page radio button is selected and click on Save Changes. This will once again make the Shopping Home your home page.



21. The following is an example of a completed Dashboard.

Jeremy Dashboard Actions View Another Dashboard

Document Search ?

Search All Documents Document Numbers, Supplier, Product Information Advanced Search

Shortcuts
[My Requisitions](#) | [My Purchase Orders](#) | [My Invoices](#) | [My Forms](#)

Approvals
[My Approvals](#) | [Approval Notifications](#) | [My Recent Approvals](#)

Organization Message ?

Welcome to
BearKatBuy
Sam Houston State University

Production Site

Here you'll find the goods and services you need for your work and research at Sam Houston State University. This site provides a familiar online shopping experience and negotiated pricing from SHSU's preferred suppliers.

11-10-17: BearKatBuy will be unavailable from Friday, November 10 at 8:00 PM until Sunday, November 12 at Noon for planned updates.

9-7-2017: On FY18 Requisitions that require a check mark in the fields for "Contract" and "Group/COOP". Departments will need to create a new requisition, not copy a requisition from the previous fiscal year. These custom fields were added in May 2017 and are not found on older requisitions. If you copy a previous year's requisition, the REQ will not have these new fields required for Procurement reporting, nor the necessary workflow approval routing for contracts. Requisitions that have a contract attached or those on a group cooperative that do not have these fields will be returned for a new requisition to be created.

If a vendor is set as manual distribution, it is the departments responsibility to forward the Purchase Order to the vendor. If Manual Distribution has been set up for a vendor, it is due to no fax or email being provided to Procurement by the department on the BearKatBuy Requisition or they have requested to send all Purchase Orders to the vendor manually.

Any changes, cancellations, or additions to a Purchase Order must be processed through Procurement on a Change Order Request Form, so that the Purchase Order and invoicing will match for payment.

5-4-17: A Contract checkbox has been added to both the Non-Catalog and the Blanket Order Forms in BearKatBuy. If there is an agreement or contract associated with the requisition then requestors will need to check the contract checkbox, which will route the requisition through Contract Review after Purchasing Review.

5-3-17: Laerdal Medical Corporation is now on BearKatBuy as a Hosted Supplier. To search for items offered through Laerdal Medical Corporation click on the sticker. A search box will then appear. If the end user knows the part number or item name, they may enter the part number or item name and click on the magnifying glass to bring up the individual items. To view the entire Laerdal Medical catalog simply click on the magnifying glass and all items will appear.

Approvals ?

Filter Approvals

View: Only My Approvals: Group by Folder:

Type	Details	Folder Name	Days In Folder
Requisitions	Number: 95667314 Name: 2017-11-09 LIB_TKW 01	Banner Budget NSF override	1

My Purchase Orders ?

There are no POs to display.

Showcases ?

Hosted Suppliers ?

Laerdal Medical Corporation Sherrin-Williams

Punch-out Suppliers ?