

# Market Dojo

## Managing your General Admin Settings

Configure your account to make it work for you.

# Managing your General Admin Settings

## Table of Contents

<b>Table of Contents</b>	<b>0</b>
<b>Introduction</b>	<b>1</b>
What is Market Dojo?	1
Accessing Admin Settings	1
<b>Display Settings</b>	<b>1</b>
Company Branding	1
Supplier Help Pages	2
Additional Visibility Settings	2
<b>Host Groups</b>	<b>4</b>
Using Host Groups	4
Managing Host Groups	4
Default Group	5
Deactivated Group	5
<b>Host Permissions</b>	<b>5</b>
Updating Host Permissions	5
Admin Permissions	6
Event Permissions	6
Contract Permissions	7
Adding Users	7
Updating your Superhost	7
<b>Participant Database</b>	<b>8</b>
Storing Participant Data	8
<b>Participant Groups</b>	<b>8</b>
Using Participant Groups	8
Managing Participant Groups	9
<b>Integrations</b>	<b>9</b>
General Integrations	9
Reporting	9

## Introduction

### What is Market Dojo?

Market Dojo offers an array of capabilities, to help procurement professionals get the most out of their sourcing and supplier engagement activities.

We believe in making better eSourcing a reality for all procurement teams, regardless of location, experience or budgets. All our products are fully on demand, designed by procurement professionals and built with a focus on ease of use.

### Accessing Admin Settings

The Admin Settings allow you to configure your account to make it work for you. They can be accessed by clicking on “Admin” in the top right hand corner of your screen. If you do not see this option, you do not have any additional administration positions and should speak to the superhost of your account. This guide will cover the Admin Settings that apply to all of our tools. Additional guides are available for specific settings relating to each of our products.



Figure 1.1 - Admin Settings

## Display Settings

### Company Branding

The Display settings allow you to customise your account in order to make it reflect your organisation’s branding. Here you can upload a logo, which will show in the top left corner of the screen for all internal users and for participants who have been invited to participate in a sourcing or onboarding activity. You can also upload a favicon which will be displayed on the tab in your browser. The band of colour at the top of the page can be altered in order to ensure it works with your logo and the menu text colour can also be adjusted in line with your branding.

Logo

Browse ...

Favicon

Browse ...

① Menu text colour

Reset

① Background colour

Reset

Figure 2.1 - Branding Settings

Choosing a web address allows you to direct suppliers to a page slightly customised with your branding, rather than going directly to a purely Market Dojo branded page.

① Web address

Figure 2.3 - Custom Web Address

## Supplier Help Pages

Links to standard supplier help pages are available in the Display settings. If you would prefer bespoke pages, these can be created at an additional fee.

- 
Market Dojo Sourcing - Supplier help page  
 To help suppliers through the eSourcing process, Market Dojo has a dedicated page which can be found [here](#).
- 
SIM Dojo Onboarding - Supplier help page - Invited  
 To help suppliers who have been invited to the onboarding process, Market Dojo has a dedicated page which can be found [here](#).
- 
SIM Dojo Onboarding - Supplier help page - Portal  
 To help suppliers who use your onboarding portal, Market Dojo has a dedicated page which can be found [here](#).

Figure 2.2 - Supplier Help Pages

## Additional Visibility Settings

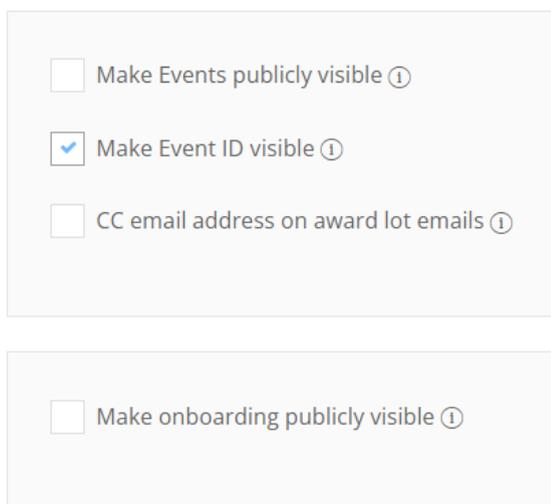
\*\*\* Please note that at time of writing, the below options are available in the Display settings, however in future these are likely to move to the Sourcing or SIM settings as appropriate.

For companies where transparency in the marketplace is important, all events can be made publicly available. This will mean that all sourcing events will be searchable and available to participants on your own white labelled portal. To use this feature, you must first choose a web address at the top of the page. This is so there is a unique url where the invitations are shown. Once enabled, all invitations will be displayed to visitors who are not logged in to the application.

Some organisations prefer to hide the system-generated ID that is attached to each event. To ensure this is visible to your users, keep the box ticked.

By default, lot award emails will only go to the relevant supplier. To automatically cc in an email address, such as an administrator or the finance team, tick the box and add the relevant email address.

SIM Dojo allows for onboarding of suppliers via both an “invited” and “uninvited” route. Elements of your onboarding process can be made publicly visible, to allow you to share access with suppliers who have not been specifically invited to onboard.



The screenshot shows a settings panel with two sections. The top section contains three checkboxes: 'Make Events publicly visible' (unchecked), 'Make Event ID visible' (checked), and 'CC email address on award lot emails' (unchecked). The bottom section contains one checkbox: 'Make onboarding publicly visible' (unchecked). Each checkbox has a small information icon to its right.

Figure 2.4 - Display Settings

## Host Groups

### Using Host Groups

Host Groups can be used throughout the Market Dojo tools to manage users' access. Users can be granted access to all sourcing events, contracts or onboarding suppliers that have been created by individuals in a particular host group. Additionally scoring (for both sourcing and onboarding) and approval responsibilities (in SIM Dojo) can be assigned to all members of a group, rather than a specific individual.

Q
↻

GROUP NAME <span style="font-size: 0.8em;"> ⓘ</span>	# OF GROUP MEMBERS <span style="font-size: 0.8em;"> ⓘ</span>	GROUP CREATED DATE <span style="font-size: 0.8em;"> ⓘ</span>
<a href="#">(default)</a>	55	23 June 2017
<a href="#">(deactivated)</a>	2	14 September 2019
<a href="#">1 - Europe Sourcing Team</a>	2	12 March 2020
<a href="#">2 - NAM Sourcing Team</a>	2	12 March 2020

Figure 3.1 - Host Groups

### Managing Host Groups

New host groups can be added by clicking on “Add New Group”. Where multiple users or users who do not yet have Market Dojo accounts need to be added to a group or groups, they can be uploaded by clicking on “Upload Hosts” and using the template provided.



Figure 3.2 - Adding a New Group

Users with accounts can be added to a host group by opening the group, selecting the individuals you wish to add from the box on the left-hand side of the page and then clicking on the “Add” button to move them into the group on the right and saving at the bottom of the page.

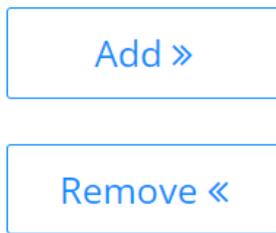


Figure 3.3 - Adding Users to a Group

## Default Group

All approved users must be added to your account's default group. When a new user signs up, you will see a "pending" note in red and will need to add them to the group. Until they are in the default group, users cannot be added to any other group and will not have access to your company-specific settings, such as templates and company branding. **Please note that to deactivate a user you do not need to remove them from the Default Group.** Removing users from the Default group will hide any events, contracts or onboarding suppliers from your account and you will need to re-add them to get this information back. See below for details of how to handle leavers or any other users that no longer need access to Market Dojo.

## Deactivated Group

When users no longer need access to their Market Dojo account, they should be added to the Deactivated group. Deactivated users will have all licences and permissions revoked and will no longer be able to access the Market Dojo platform, however all their data will remain within the applications for others to access and report on.

## Host Permissions

### Updating Host Permissions

User access is managed on the Host Permissions tab. By default, only the account's Superuser will have access to any additional administration settings and no user will automatically see any other individual's events, contracts or onboarding suppliers. To update an individual's permissions, click on the pencil icon by their name.

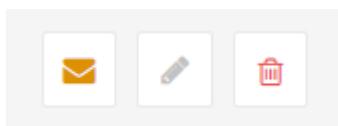


Figure 4.1 - Editing Host Permissions

Once a user's permissions have been updated, the message icon next to their name will show in orange. To notify the user of any changes by automated email, click on this button. Once an email has been sent to the user, the button will turn green. To remove the user's permissions entirely, click on the bin icon.

## Admin Permissions

The pop-up which appears once you click on the pencil icon will include a number of tabs. For any user who is part of the organisation's Default group, the first tab to appear will be "Admin Permissions". Here you can give users the ability to access specific Admin settings. View access will allow them to see the relevant information in the settings but make no changes, whereas "Edit" access will mean they can make amendments.

### Admin Permissions

Display Settings <input type="text" value="Edit"/>	Host Permissions <input type="text" value="None"/>	Own event permissions <input type="text" value="Edit"/>
Host Groups <input type="text" value="None"/>	Participant Groups <input type="text" value="None"/>	Participant Database <input type="text" value="None"/>
Event Tagging <input type="text" value="None"/>	Event Library <input type="text" value="Edit"/>	Questionnaire Library <input type="text" value="None"/>

Figure 4.2 - Admin Permissions

## Event Permissions

The Event Permissions tabs allow you to give users access to events owned by others. Individuals can be given "View" or "Edit" access. This can be to a specific event, to all events created by one individual, or to all events created by any user that is part of a Host Group. Users can be given multiple permissions to allow them to see all the events that are relevant to them. These access rights can be removed at any point by clicking on the rubbish bin icon. Should the rules for any given user clash, for example if a user has been given both "View" and "Edit" permission for an event, the highest level of permission will apply, i.e. the "Edit" permission in this example will supersede the "View" permission.

You can give a user access to all events within your account by giving them permission to view or edit "events if Host Group is default".

## Event Permissions

① User can...	① event(s) if...	① is...	
View	Event Owner		+
① User can...	① event(s) if...	① is...	
View	Event Owner	ndhost1@marketdojo.com	✖
① User can...	① event(s) if...	① is...	
Edit	Host Groups	Health and Safety	✖
① User can...	① event(s) if...	① is...	
Edit	Event	Office Hardware (ID: 76628)	✖

Figure 4.3 - Event Permissions

## Contract Permissions

Contract permissions work in the same way as event permissions. Users can be granted the ability to view or edit specific contracts or contracts created by one individual or anyone who is part of a specific group.

## Adding Users

Users do not need to be part of your Market Dojo account for you to give them access to events or contracts. To give users who do not yet have an account or who are part of another company access to specific sourcing events or contracts, click on “Add User” and input their email address.

+ Add User

+ E-mail user(s) of any changes

Figure 4.4 - Adding New Users

## Updating your Superhost

Each account will have one superhost who has access to all administrative settings. This permission can only be switched by the existing superhost. The superhost will see the page below when clicking on the pencil icon and will choose the new superhost from the drop-down.

## Change Superhost

① User E-mail



*\* In the transfer section you can select the user whom you want to transfer the Superhost Privilege.*

Figure 4.5 - Updating the Superhost

## Participant Database

### Storing Participant Data

Participant data is stored in the Participant Database. Any time a supplier is invited to onboard or be part of a sourcing event they will be added to your database. Here you can see a list of participants, the groups they are part of, whether they are registered and their onboarding status.

PARTICIPANT	CONTACT DETAILS	GROUPS	REGISTERED	ONBOARDING STATUS	EVENT HISTORY
Md Part 1 Civils Supplier Limited	0233 65869 87 mdpart1@marketdojo.com	Water Bottle Suppl... (default), Maintenance, Generic Drugs, IT,...	None Selected	None Selected	Invited: 211 Participated: 161
Md 3 J Hawk & Sons	0123 458 588 ndparticipant3@marketdojo...	(default), Marketing - LATM, Laptop Suppliers,...		-	Invited: 36 Participated: 21

Figure 5.1 - Participant Database

## Participant Groups

### Using Participant Groups

Participant Groups can be set up to make it quick and easy to invite multiple suppliers to either a sourcing or onboarding event.

GROUP NAME	# OF GROUP MEMBERS	GROUP CREATED DATE	ACTION
<a href="#">Injection Moulding</a>	6	02 November 2018	
<a href="#">IT</a>	18	03 November 2017	

Figure 6.1 - Participant Groups

## Managing Participant Groups

New participant groups can be added by clicking on “Add New Group”. Participants can be added to groups in bulk by clicking on “Upload Participants” and using the template provided. Participants can be added one by one or in smaller numbers by opening the group, selecting the individuals you wish to add from the box on the left-hand side of the page and then clicking on the “Add” button to move them into the group on the right.

## Integrations

### General Integrations

Market Dojo has an open API, which allows you to export your data and / or link to other tools. We currently offer integration with Per Angusta and a number of Single Sign-on options, however we are always looking to increase our capabilities here.

PLATFORM NAME	ACTIONS
Per Angusta	 
Reporting	 
Microsoft Azure Active Directory	 
Google OAuth2	 

Enable Market Dojo API [?](#)

[+ Okta OAuth2](#) [+ SAML](#)

Figure 6.2 - Integrations

### Reporting

One use of the API that is adopted by many clients is our reporting capability. By enabling the API, data from sourcing events, contracts and onboarding can be exported out into a reporting tool.

A service that we offer at a small additional cost is the creation of bespoke Power BI reports, adapted to meet your specific needs. Once built, a Power BI report can be added to your account and shown on a “Reporting” tab to those you choose to give access to.