



# Dashboard

Quick Guide

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## 1 Introduction to the Dashboard

### It is exclusively available to our enterprise users

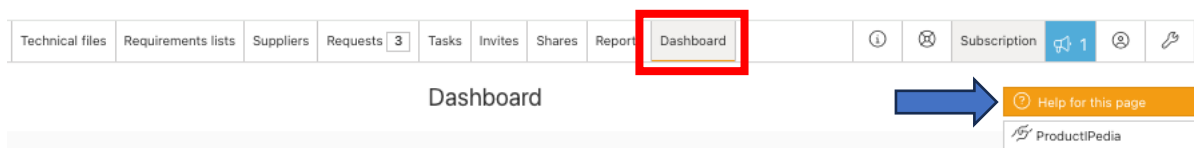
This functionality is specially developed for and exclusively available to our Enterprise customers

The dashboard enables you to extend your use of the platform beyond managing compliance documentation for non-food products.

With this dashboard, we help you step up your game and provide insight into critical metrics such as risks, supplier performance, and operational performance.

This step-up fits well with our strategy to become more than a compliance tool and become an integral part of our customers' business decision-making.

You can find the Dashboard in your account.

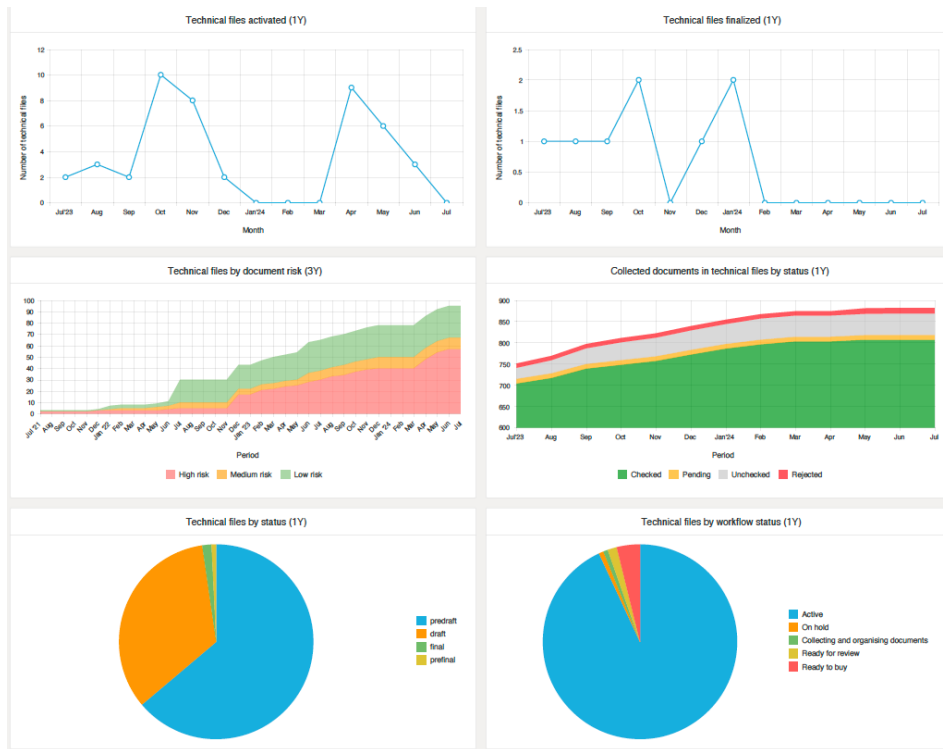


A dashboard leverages the data in your account, so it is important that such data is available and correct. The Help for this page provides more information on how to ensure that all parameters are set correctly.

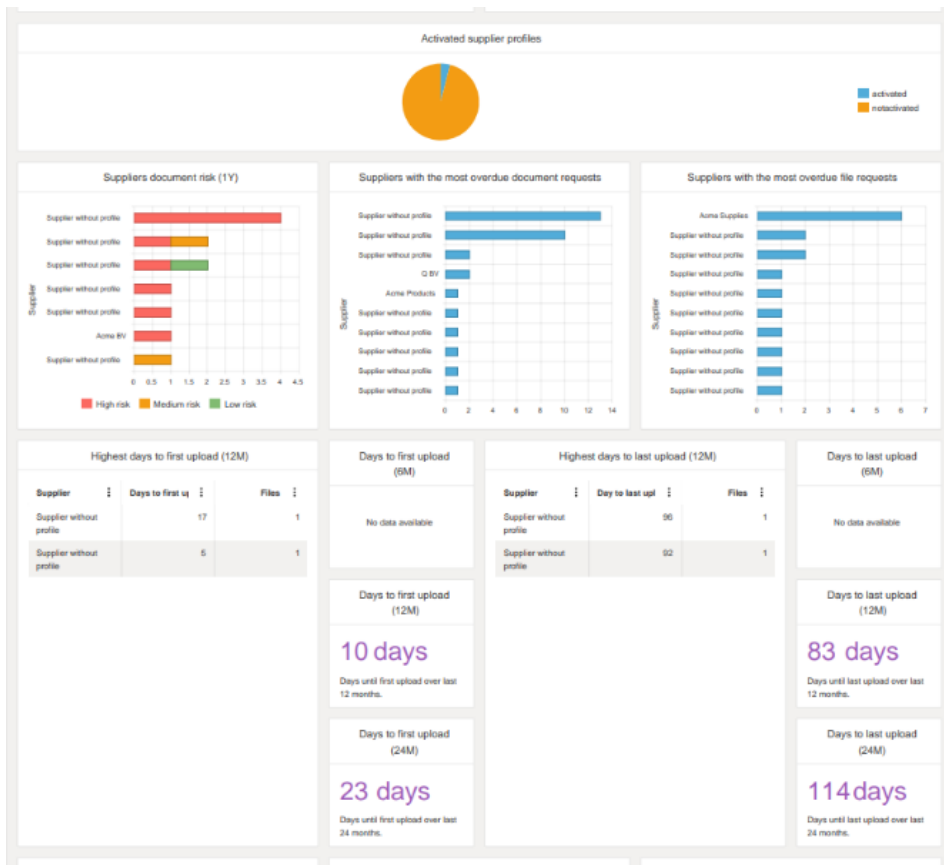
The online version of this document can be found by clicking the “help on this page” button on the Dashboard tab.

## 2 The dashboard can be divided into two parts

### 2.1 Operational performance



### 2.2 Supplier performance



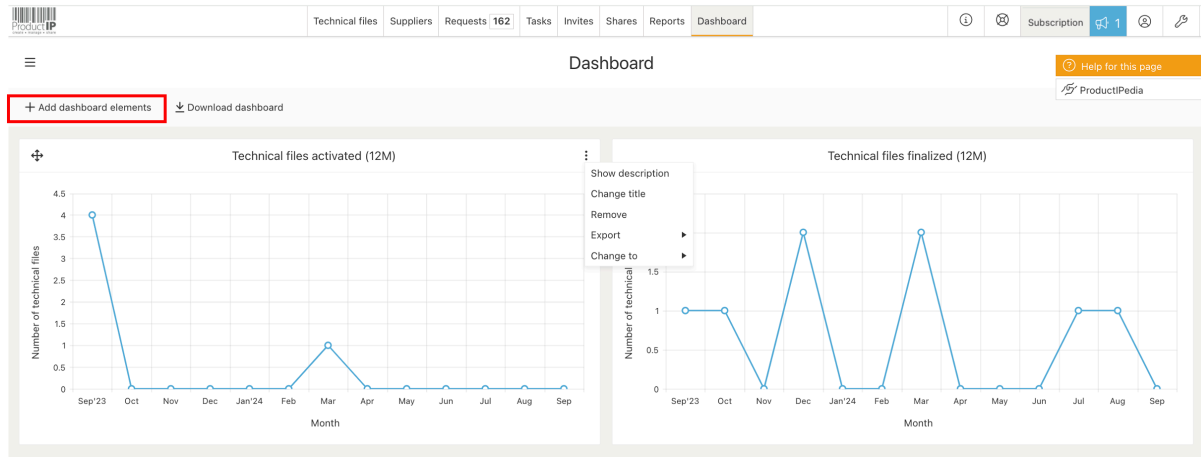
A WORLD IN WHICH PRODUCTS CAN BE TRUSTED

### 3 How does it work

On the Dashboard, we have several default graphs based on the information and settings in your account. You can add extra elements to the Dashboard and arrange the order with drag and drop.

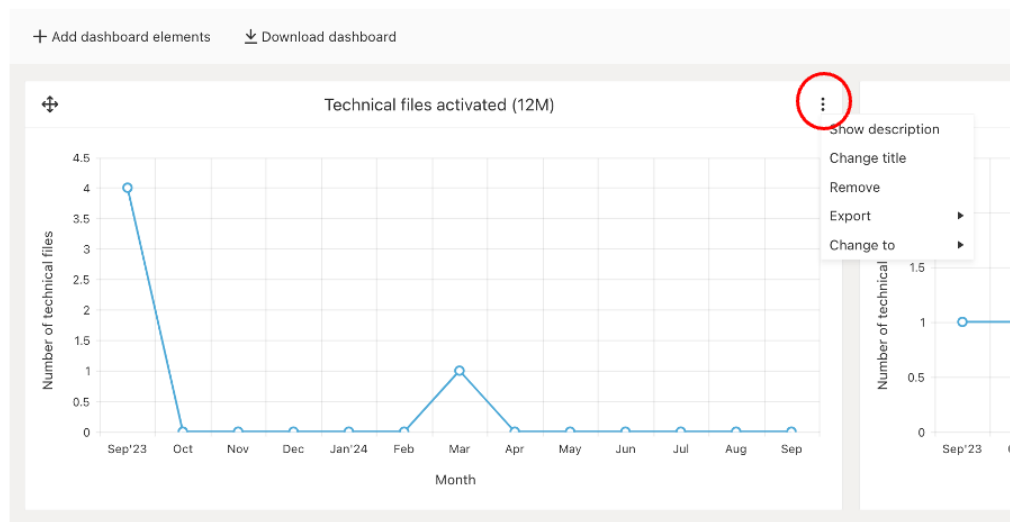
All changes you make, will only be visible in your user account.

Each user can set his own dashboard.



When you put your mouse on an element, 3 dots appear.

Clicking the dots opens a menu that will allow you to view the description of the element, change the title, remove the element, export the element to a file or to the clipboard and change the visualization of the element.



To get the best overview of the data in your account, it is important that the work in the technical file is followed up properly.

1. Complete the requirement list correctly  
- Make Requirements not applicable if not applicable; otherwise, it will be shown as an 'open' requirement and may show the file 'red'.

[More information](#)

2. Add the "Document risk"

- One can determine the level of risk based on the presence or absence of a document, which affects the status of the technical file, showing red, orange, or green.

[More information](#)

### 3. Using the workflow status to monitor file progress

- Keep track of file progress using a workflow status and mark the file as completed. Additionally, you can differentiate between different technical file statuses based on the workflow status. A chart displaying this information is available on the dashboard. Based on the workflow status, one can distinguish between the status of the technical file. A chart for this is also included in the dashboard

[More information](#)

### 4. Activate the supplier profile, to see the supplier name

- What are Supplier profiles?

Some compliance evidence is more related to the supplier than to the article and should not be collected for every Batch, for example, the Social compliance audit report. It makes more sense to manage that on the supplier level instead of in every Technical file.

[More information](#)

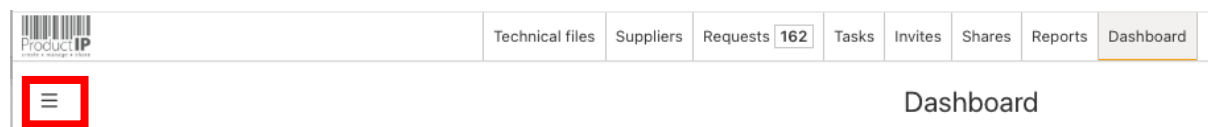
### 5. Follow up correctly on the supplier's invitation

- The system looks at the supplier's performance on the data in the file, and if multiple invites are present in a file, or invites are removed, it displays incorrect data.

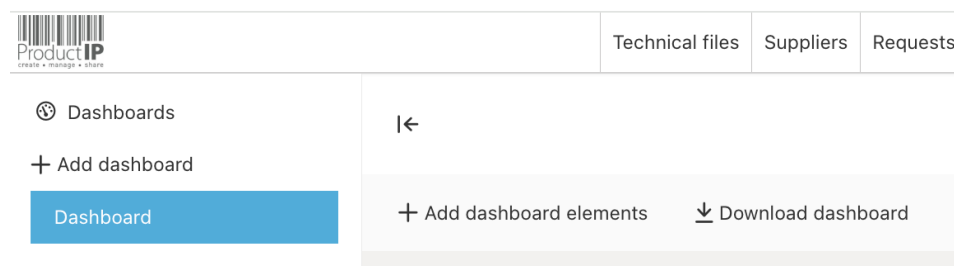
[More information](#)

## 3.1 How to set up your own dashboard

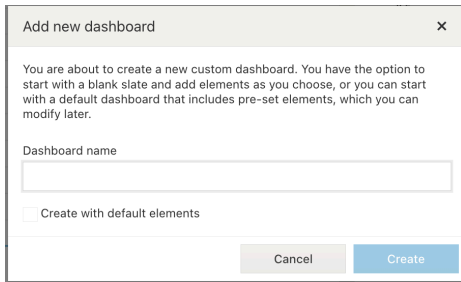
It is possible to add an extra dashboard.



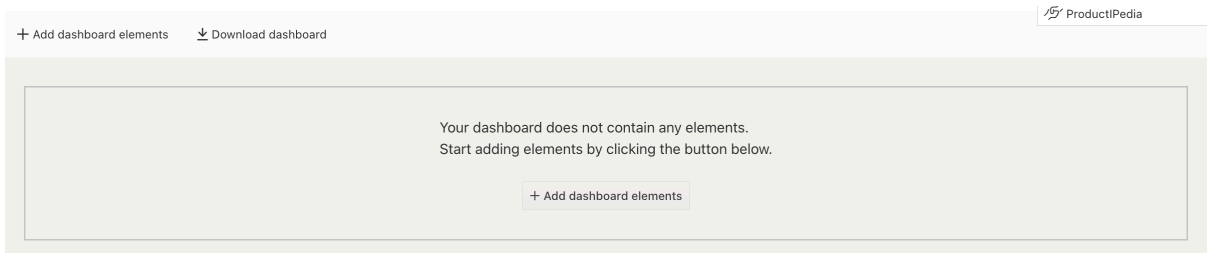
- Click on the three strips.



- Click Add dashboard



- Add name and click Create



- Click "Add dashboard elements" to select the elements you want on your dashboard