



Dashboard User Management (only Agency Owners have this capability)

Setting Up New Users:

1. Log into Dashboard using state e-mail address and password. Click Login.

SBSD

Genevieve.Oei@sbsd.virginia.gov

Don't remember your password?

LOG IN >

2. Click drop-down arrow beside circle with initial in it (in top-right corner of the page)

Agency: Commonwealth of Virginia

Dashboard Data Management SWaM Plan

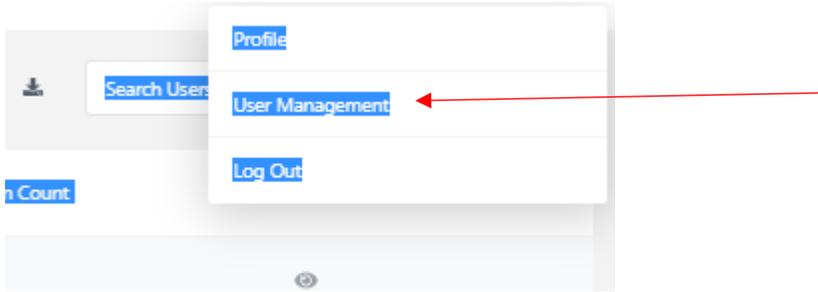
Users

Full Name	Email ID	Role	Created Date	Last Login Date	Login Count	Action
Stephanie Adams	stephanie.adams@doli.virginia.gov	SWaM Plan Administrator	Aug 30, 2019	Sep 04, 2019	1	ⓘ
Sheila Alvis	salvis@vedp.org	Agency Owner and SWaM Plan Administrator	Sep 06, 2019	Sep 06, 2019	2	ⓘ
Cindy Arthur	cindy.arthur@dbhds.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	Jul 15, 2019	2	ⓘ
Marra Austin	maustin@vm.edu	Agency Owner and SWaM Plan Administrator	Jun 20, 2019	Aug 06, 2019	4	ⓘ
Feliscia Bagby	feliscia.bagby@dqjs.virginia.gov	Agency Owner and SWaM Plan Administrator	Aug 19, 2019	Aug 19, 2019	1	ⓘ
Garry Barnes	garry.barnes@dj.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	-	0	ⓘ
David Barron	david.barron@dfs.virginia.gov	Report Viewer	Aug 16, 2019	-	0	ⓘ
Lance Billard	lbillard@vccs.edu	Agency Owner and SWaM Plan Administrator	Jul 09, 2019	Sep 05, 2019	1	ⓘ
Laura Bishop	laura.bishop@vadoc.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	Sep 06, 2019	4	ⓘ
Roger Bowling	roger.bowling@doav.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	-	0	ⓘ

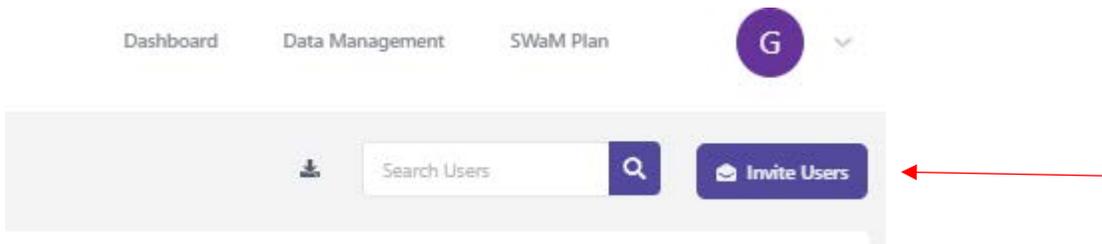
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3. Choose User Management from Drop-Down List. It is the second option of the list.



4. Click Invite Users Button



5. Enter Information for new user: First name, Last Name, e-mail address, Choose Agency From Drop-Down List. Choose Role From Drop-Down List. Data Manager-can enter adjustments, subcontractor spend, self-Reporting transactions (self-reporting agencies & authorities only). Can also view reports

SWaM Plan Administrator-Has access to complete SWaM Plan

Report Viewer-Person in upper management who only needs to view reports. This person does not have ability to enter/change data in the dashboard.

Agency Owner-Has same access as Agency Data Manager, but can also assign/change/remove user's access

SWaM Plan Approver-Must be agency Head. This person is able to sign off on the Agency SWaM Plan.

There are a few combo roles that are combinations of the above roles.



6. Click the invite button.

Invite User ✕

First Name*

Last Name*

Email ID*

Agency Name*

Role*

7. The New user will receive a system generated e-mail from noreply @sbsd.virginia.gov. They will need to click the link in the e-mail to activate their account and create a password. The e-mail may sometimes go to a user's junk/spam or trash folder, so the user may need to check those folders if they don't see the e-mail in their inbox.

Expenditure Dashboard - Account Setup

📧 Inbox ✕ Updates ✕

Expenditure Dashboard noreply@sbsd.virgi... Mon, Jun 24, 3:39 PM (20 hours ago) ☆
to me ▾



COMMONWEALTH of VIRGINIA
Department of Small Business and Supplier Diversity

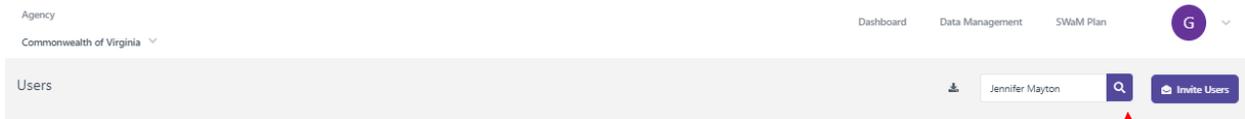
Hi,
Your account in SBSD Expenditures Dashboard is successfully created. Click here [setup](#) your account.

If this email was not intended for you, please contact Department of SBSD

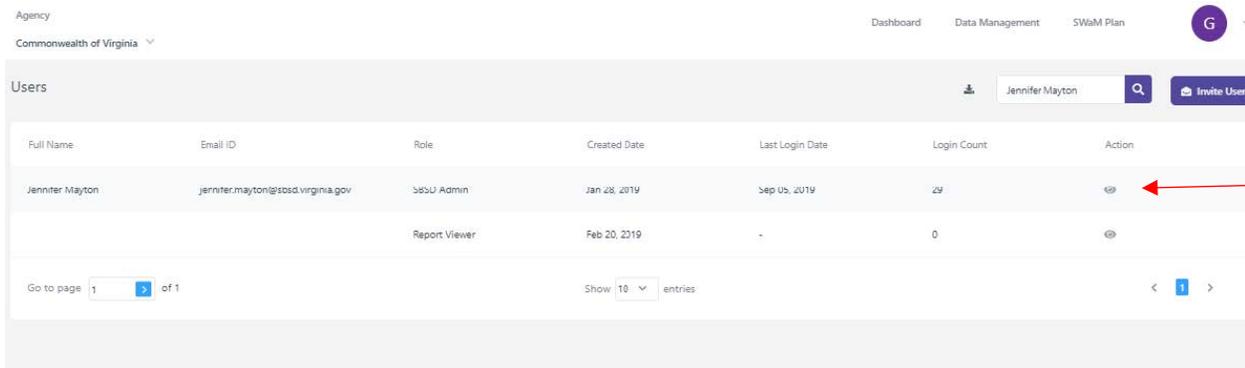


Changing a User's Role:

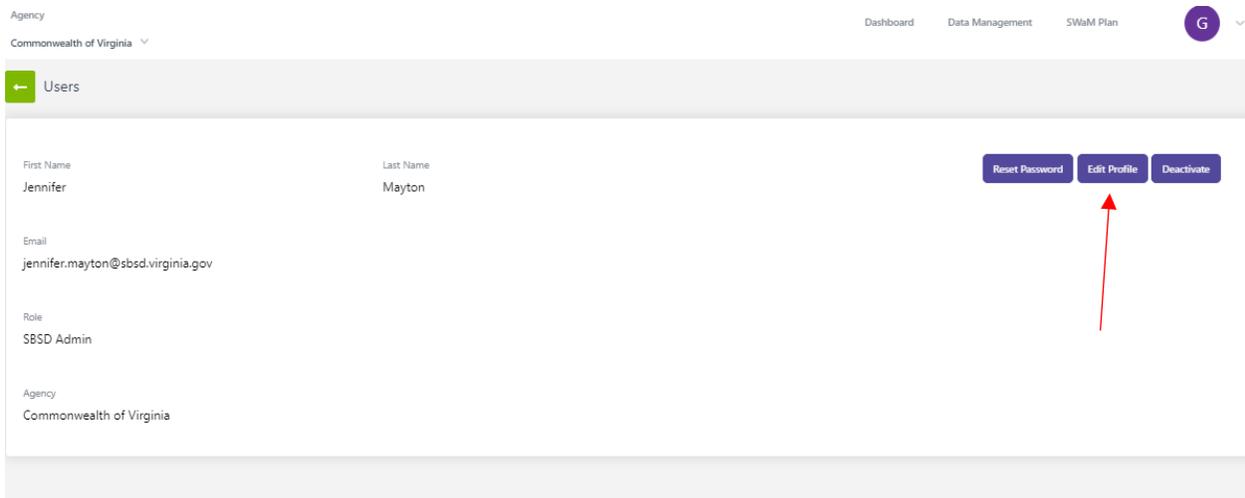
1. Log into the Dashboard and go to User Management by following steps under setting up new users.
2. Search for the Name of the user whose role you want to change by entering their name in the search box and clicking the magnifying glass.



3. Click the eyeball icon next to the user's name under actions.



4. Click Edit profile button



5. Under Role Drop-Down, choose new role and hit update button.

Edit Profile ✕

First Name*

Last Name*

Email ID*

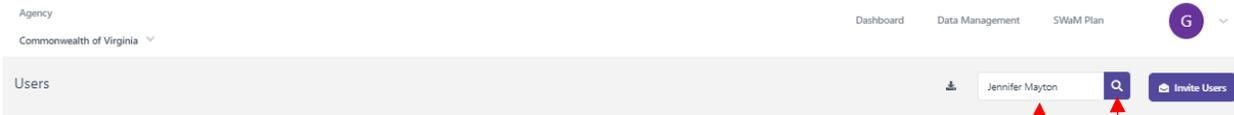
Agency Name*

Role*

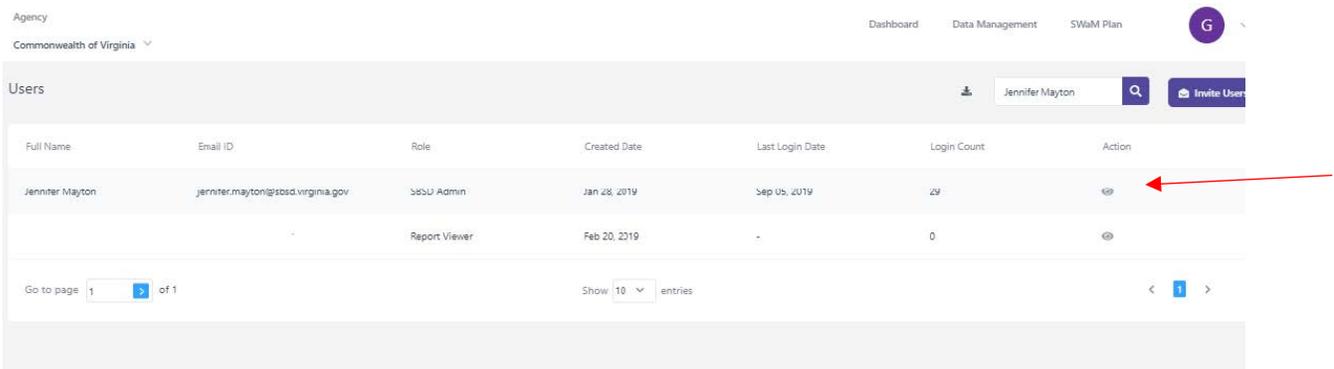
- Ability to Add, Edit, Modify Users across the Expenditure Dashboard Application
- Ability to download User Management reports
- Ability to enter data into the SWaM Plan and submit for approval
- Ability to upload Sub Contractor Transactions, Adjustments, Self Reporting Transactions (if Self Reporting Agency)
- Ability to download Transactions, Vendor Reports (with Tax ID)
- Ability to review submitted SWaM Plans, update deadlines for SWaM Plan

Deactivating a User who is no longer with the Agency:

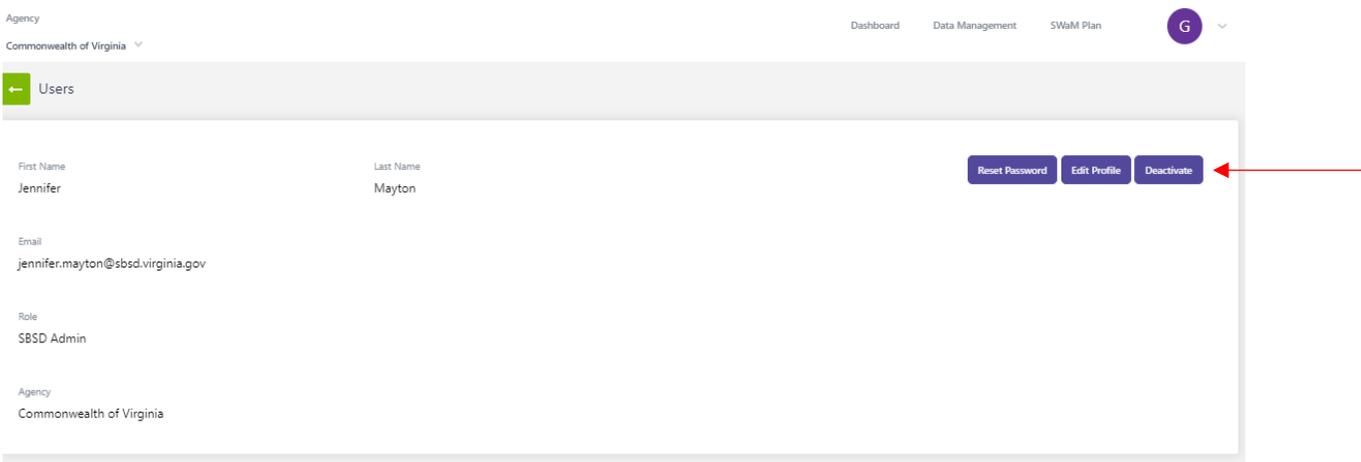
1. Log into the Dashboard and go to User Management by following steps 1-3 Under setting up new users.
2. Search for the Name of the user who you want to deactivate by entering their name in the search box and clicking the magnifying glass.



3. Click the eyeball icon next to the user's name under actions.



4. Click the deactivate button next to the user's name



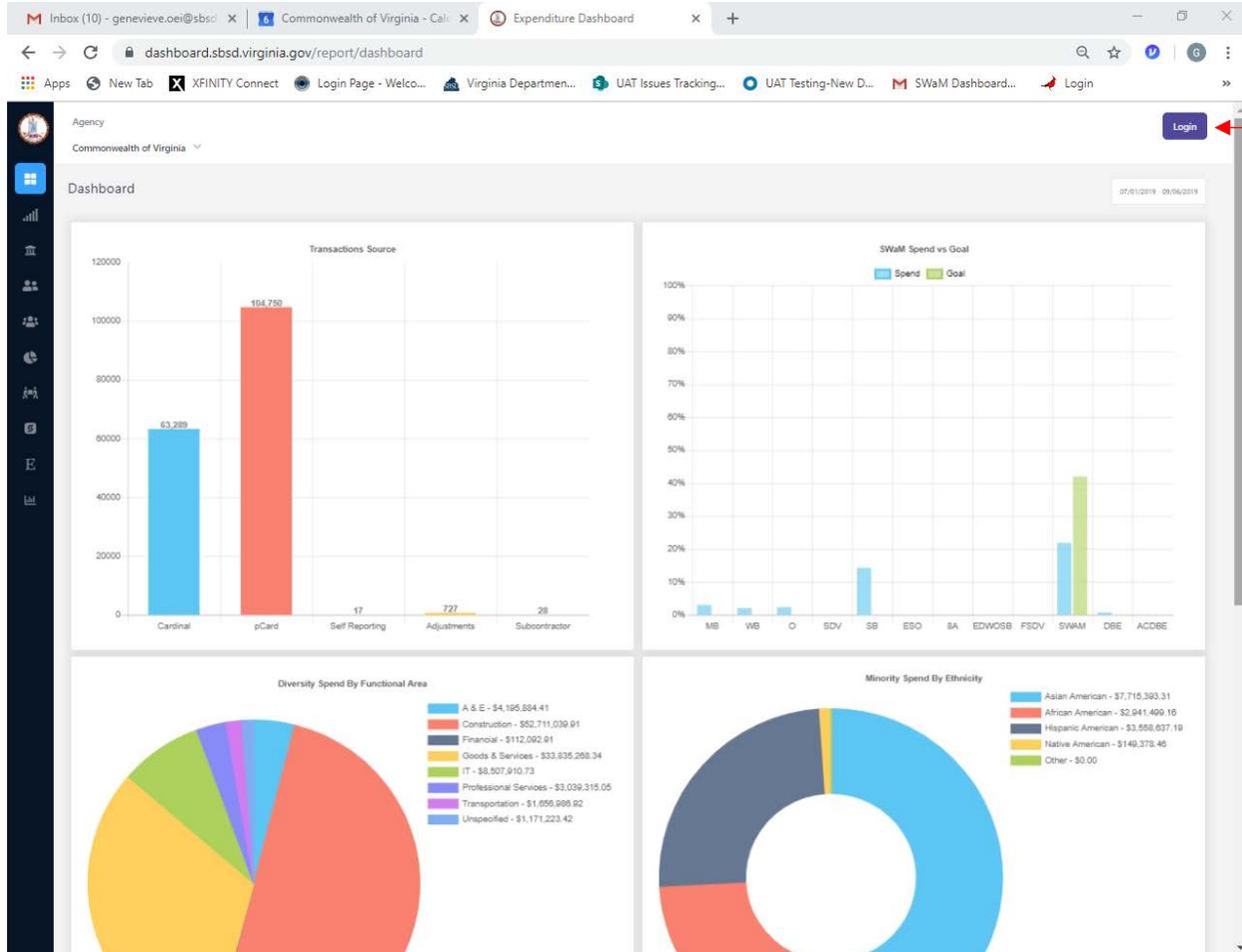
5. A message will pop up on the screen saying that the user's account has been deactivated and they will get an e-mail saying that their account has been deactivated.

Requesting a password reset: If a user has activated their account by clicking the link in the activation e-mail and created a password, but forgotten their password, they can request a password reset from the login screen or the Agency Owner can do it for them from the User Management page.



User:

1. Click login

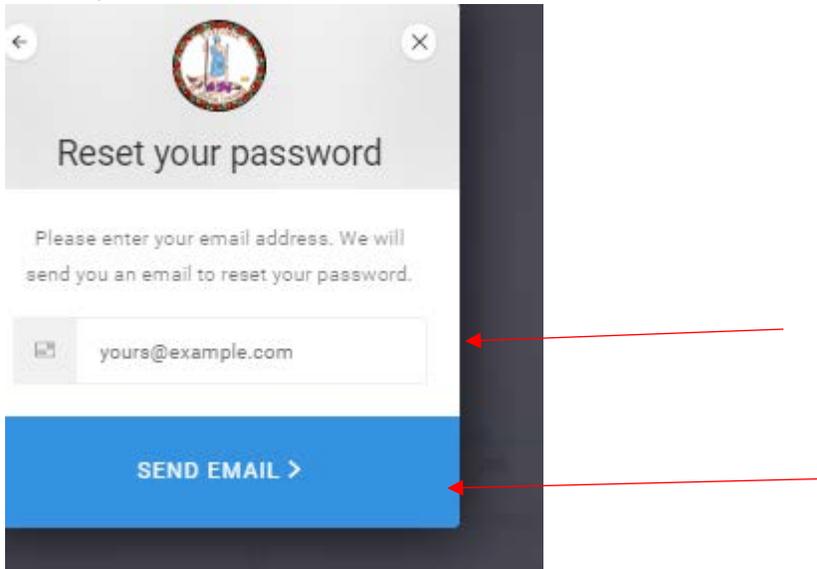


2. Click Don't remember your password? Link

The login form contains the following elements:

- SBSD logo and name
- Email input field: yours@example.com
- Password input field: your password
- Link: Don't remember your password? (highlighted with a red arrow)
- Button: LOG IN >

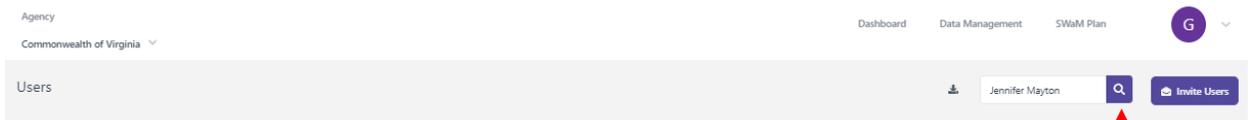
3. Enter your e-mail address in the box and click the send e-mail link.



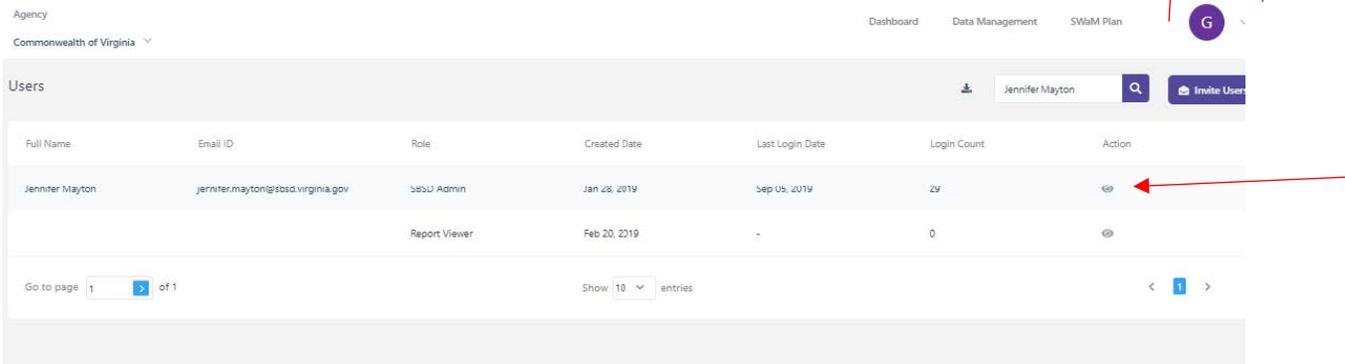
4. You will get a system generated e-mail. Follow the prompts in the e-mail to reset your password.

Agency Owner for User:

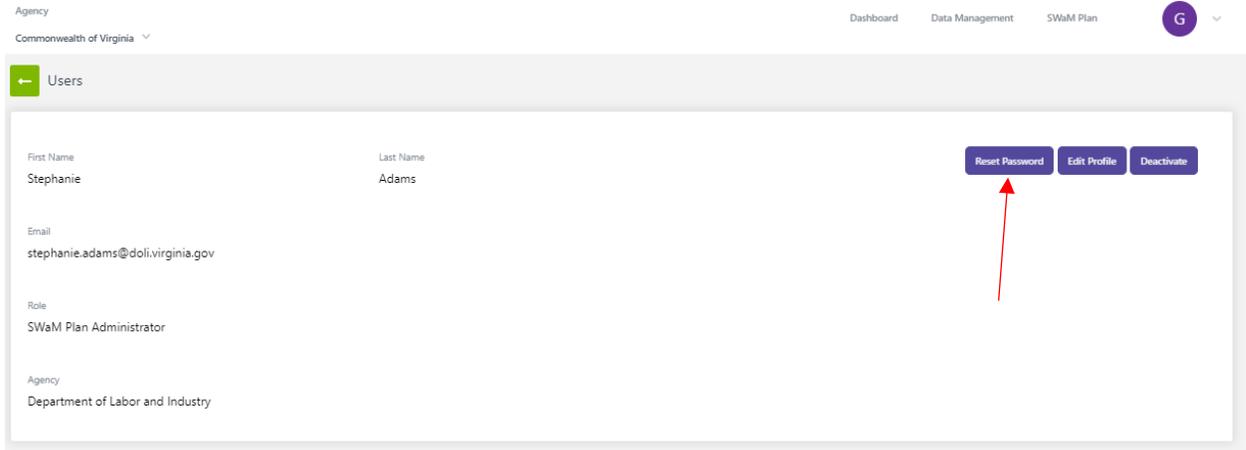
1. Log into the Dashboard and go to User Management by following steps 1-3 under setting up new users.
2. Search for the Name of the user who you want to send password reset e-mail to by entering their name in the search box and clicking the magnifying glass.



3. Click the eyeball icon next to the user's name under actions.



3. Click Password Reset button



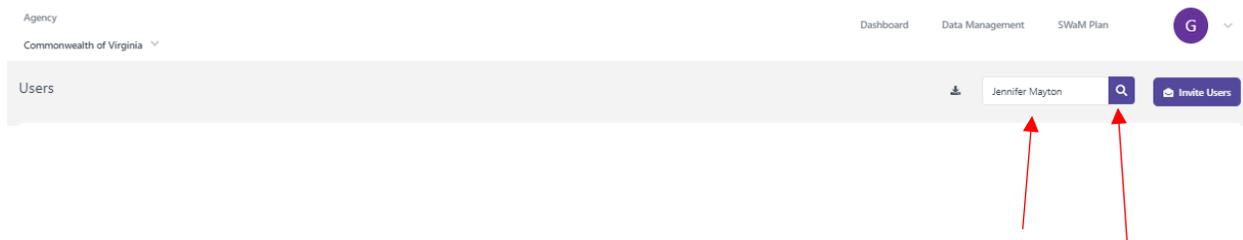
4. The user will get a system generated e-mail. They will need to follow the prompts in the e-mail to reset their password.

Sending a New Activation e-mail:

If a User has not yet activated their account, the Agency Owner will see an envelope icon next to the users name when going to user management. Activation e-mails are only good for a short period of time. If a user does not activate their account within that time period, the agency owner will need to send another e-mail.

1. Log into the Dashboard and go to User Management by following steps 1-3 under setting up new users.

2. Search for the Name of the user who you want to send new activation e-mail to by entering their name in the search box and clicking the magnifying glass.





3. Click the envelope icon next to the user's name.

Agency: Commonwealth of Virginia

Dashboard | Data Management | SWaM Plan

Users

Full Name	Email ID	Role	Created Date	Last Login Date	Login Count	Action
William Childress	william.childress@mvdob.virginia.gov	Agency Owner and SWaM Administrator and Approver	Jun 28, 2019	-	0	👁️
Dallas Clark	clarkdb@vmi.edu	SWaM Plan Approver	Jul 15, 2019	-	0	👁️ ✉️
William "Will" Clear	will.clear@dmme.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	-	0	👁️
Christopher "Chris" Cole	chris.cole@dcr.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	Sep 06, 2019	2	👁️
Al Collado	acollado@portofvirginia.com	SWaM Plan Administrator	Jul 15, 2019	-	0	👁️ ✉️
Kristin Collins	kristin.collins@vdh.virginia.gov	Agency Owner	Jan 28, 2019	-	0	👁️
Cynthia Colvin	cdcolvin@nsu.edu	Agency Data Manager	Sep 03, 2019	Sep 03, 2019	1	👁️
Dawne Cooper	dawne.cooper@dpor.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 20, 2019	Sep 03, 2019	5	👁️
Fernanda Crandol	fernanda.crandol@dof.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	-	0	👁️
Sheri Crocker	sheri.crocker@mrc.virginia.gov	Agency Owner and SWaM Plan Administrator	Jun 24, 2019	-	0	👁️

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4. The user will receive a new system generated e-mail from noreply @sbsd.virginia.gov. They will need to click the link in the e-mail to activate their account and create a password. The e-mail may sometimes go to a user's junk/spam or trash folder, so the user may need to check those folders if they don't see the e-mail in their inbox.

Expenditure Dashboard - Account Setup

Inbox x Updates x

Expenditure Dashboard noreply@sbsd.virgi... Mon, Jun 24, 3:39 PM (20 hours ago) ☆
to me ▾



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Department of Small Business and Supplier Diversity

Hi,

Your account in SBSD Expenditures Dashboard is successfully created. Click here [setup](#) your account.

If this email was not intended for you, please contact Department of SBS

