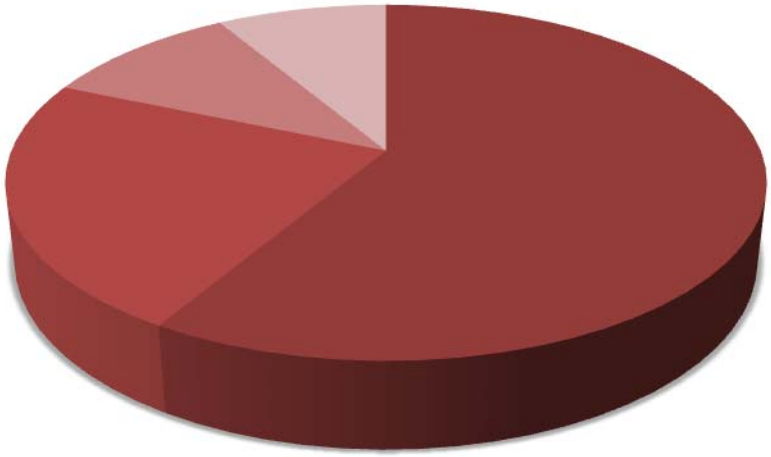
Virginia's Department of Minority Business Enterprise



SWaM/SDV Dashboard User Manual

Note:

To view the expenditures and analysis on the Dashboard, a logon name and password is not required. It is required for submitting data to the Dashboard and reviewing the agency's detailed transactions only.

Access to the Dashboard

In order to get to the DMBE dashboard site, please click on the SWaM Dashboard link located on the right side of the DMBE main website

http://www.dmbe.virginia.gov

Follow the link to the DMBE Dashboard area or if you would like to go directly to the dashboard site, enter the below address in the address bar and press enter.

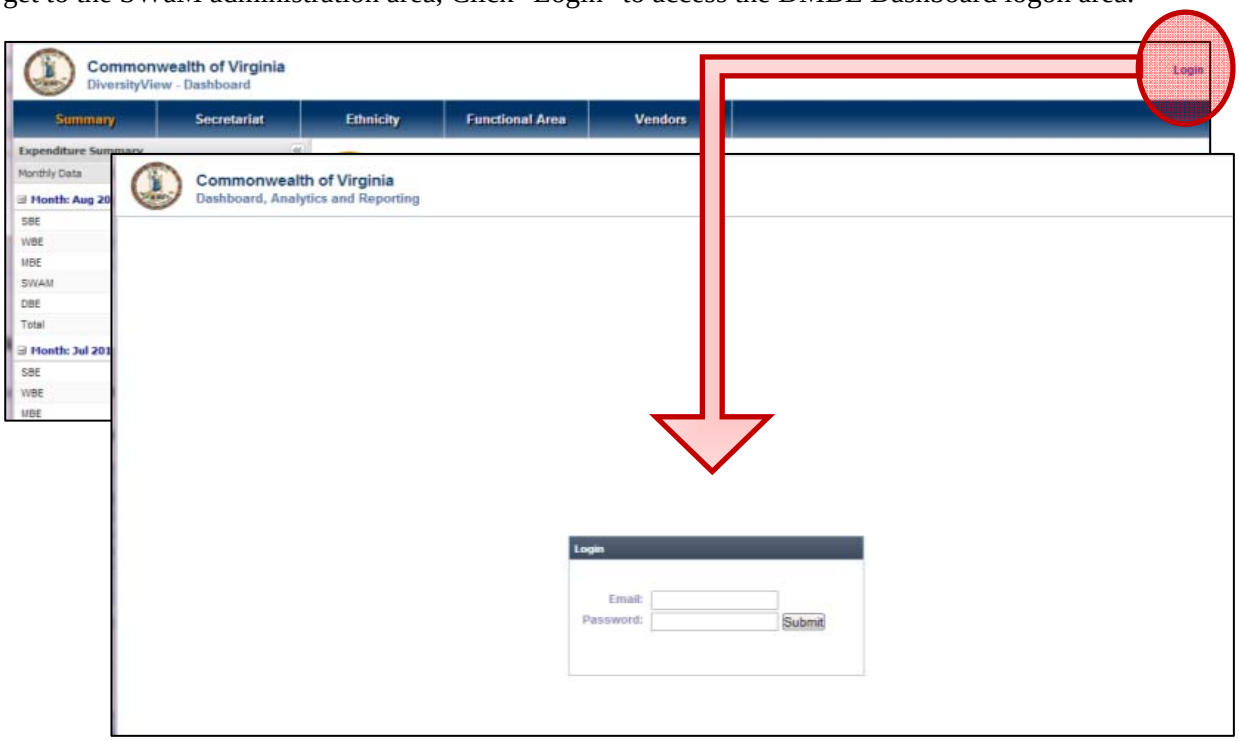
https://portal.bfountain.com/virginia/index.jsp

A logon name and password is required for submitting data to the dashboard and reviewing the agency's detailed transactions.

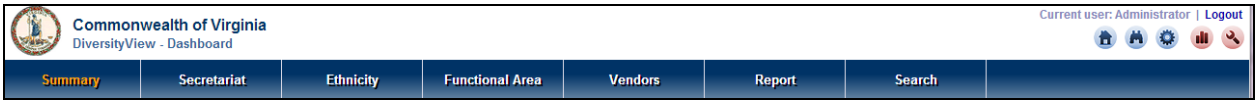
In order to get a logon name and password for the DMBE dashboard administrative area, a request must be sent by the supervisor of the SWaM champion in need of a logon name and password, addressed to Angela.Chiang@dmbe.virginia.gov. Please provide the following information in the body of the e-mail:

Agency Code:
Agency/institute Name:
Name:
Email address:
Phone number:
Other agency codes that associated with your agency (parent agency code, sub-agency code):

To view the expenditures and analysis on the Dashboard a login name and password is not required. . It is required for submitting data to the Dashboard and reviewing the agency's detailed transactions only. To get to the SWaM administration area, Click "Login" to access the DMBE Dashboard logon area.



Once you log into the application, there are a number of icons in the top right corner of the screen to guide you through the dashboard.



Go to Homepage
Takes you back to the homepage you have designated. The default homepage is the summary tab. Each user can designate their own home page and navigate directly to that page when they log in.

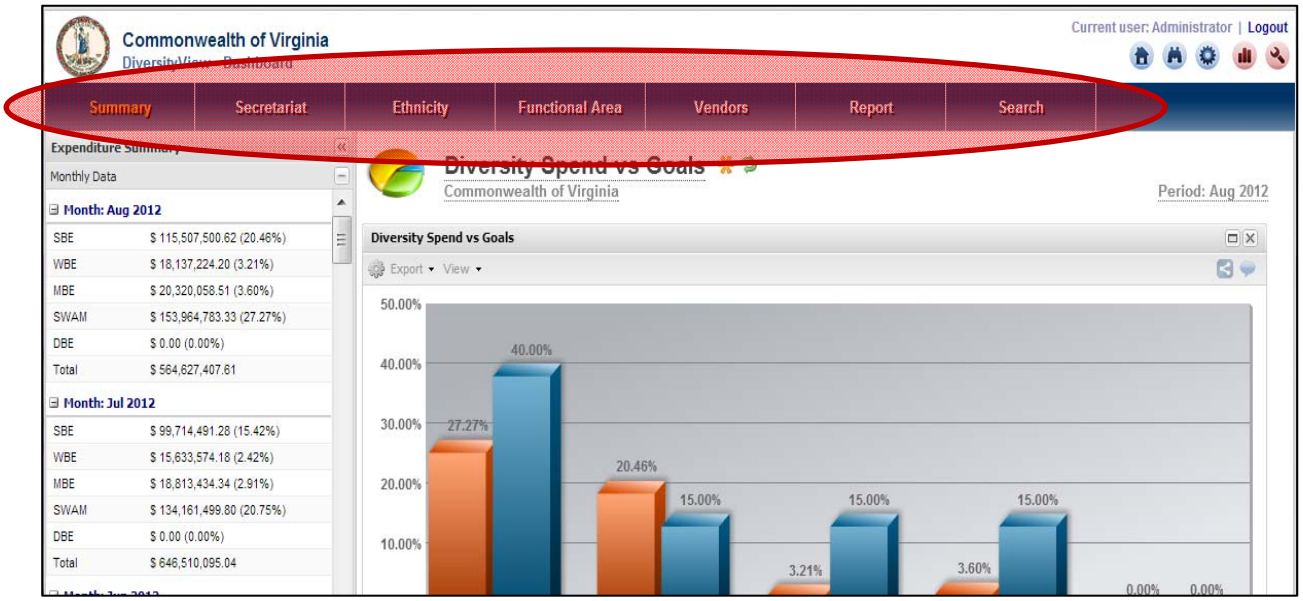
Refresh Dashboard
Refreshing the dashboard moves new approved transactions into the dashboard. The process is currently available only to DMBE to manage when the transactions are rolled into the dashboard.

Go to Dashboard Area
Selecting this button takes the user to the default dashboard page: the Summary view.

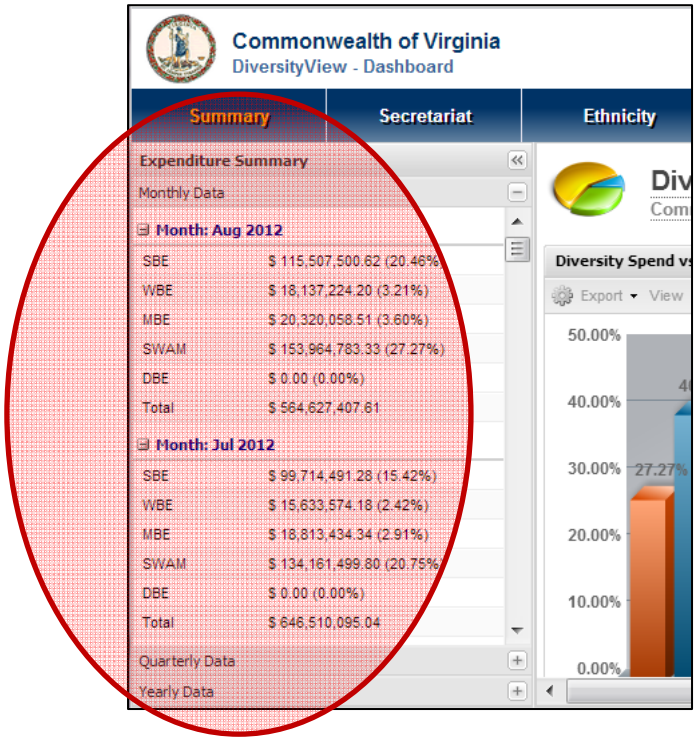
Go to Administrative Area
Takes the authorized users to the administrative area where they can manage their transactions, subcontractor data and their annual SWAM plans.

Diversity Dashboard and Analytics

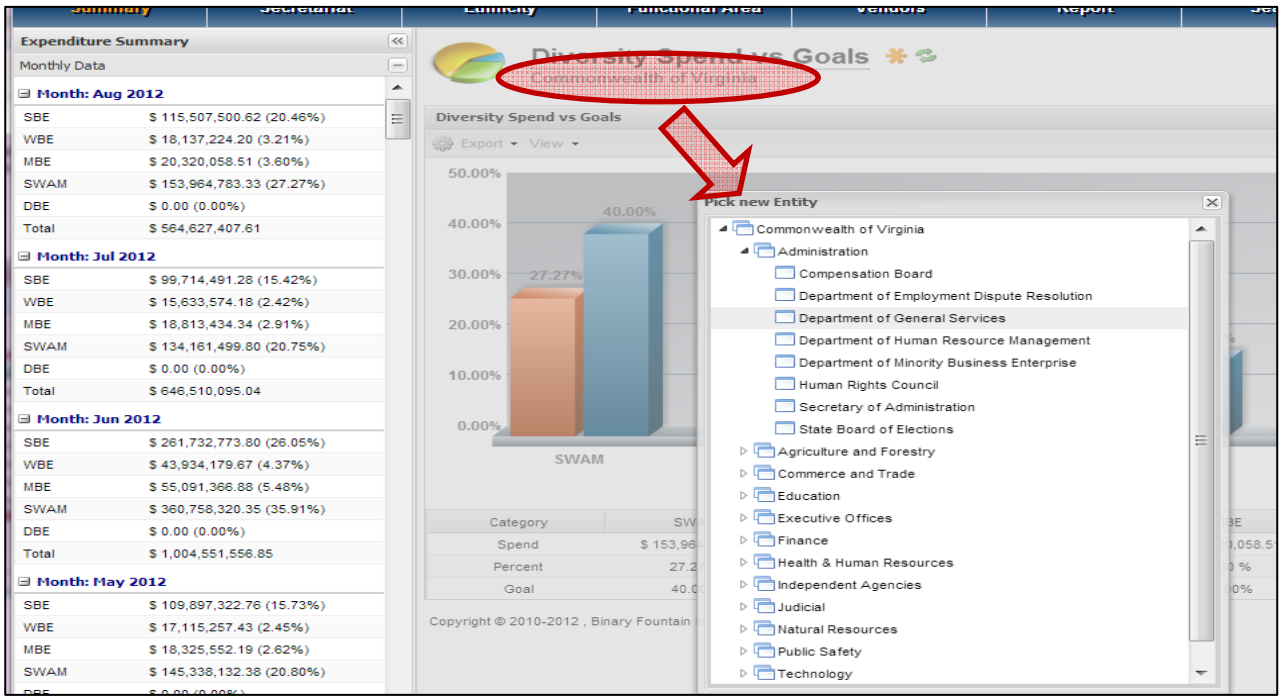
To see further details or alternate breakdowns of agency SWaM expenditures, click the tabs located at the top of the graphical chart on the DMBE Dashboard.



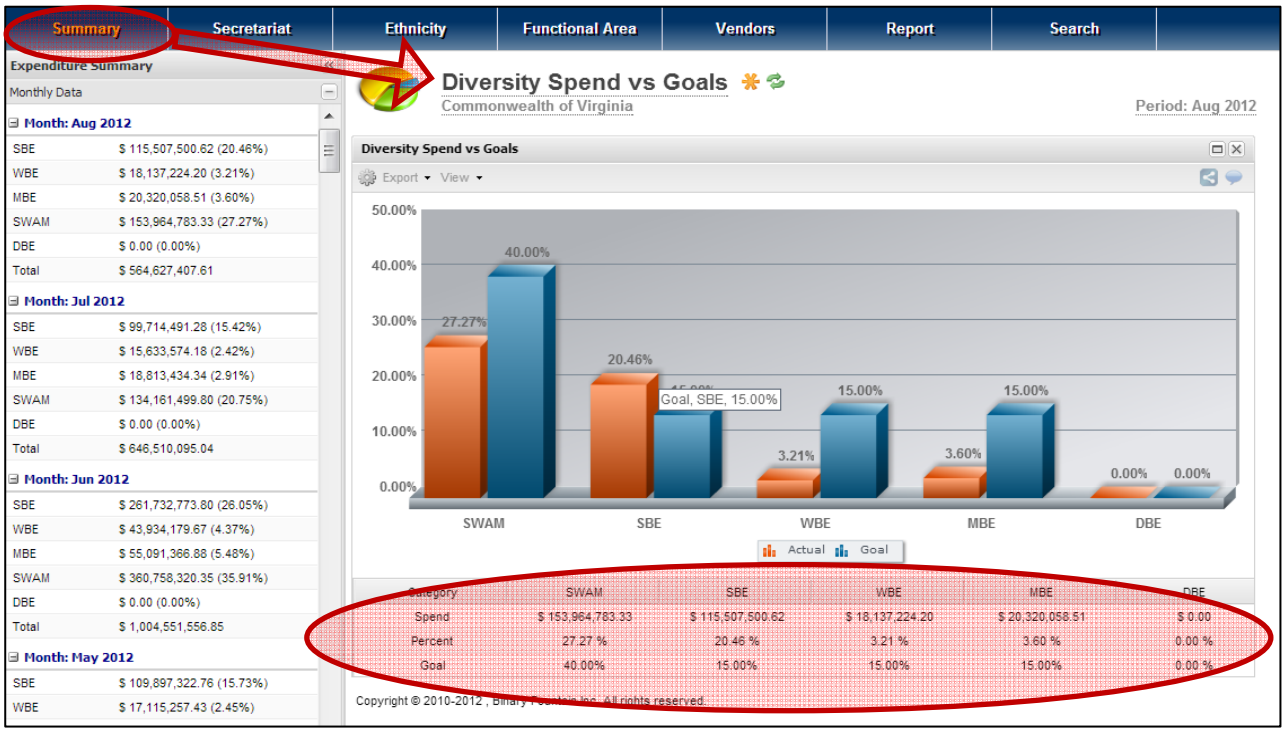
In order to be able to analyze specific expenditure time periods, the left column, titled "Expenditure Summary", will provide the detailed expenditure drill drown for SWaM Discretionary spend. The detailed expenditure amounts can be analyzed for Yearly, Quarterly and Monthly periods. Click on any period on the LHS, and the data for the corresponding period will be presented in the report. The user selections are sticky – their period selection is saved and will be used during their future logins.



To analyze the data for a specific agency, the user can click on the name the current entity (Secretariat, Commonwealth, Agency) in the content area, and selecting an alternate agency from the list.



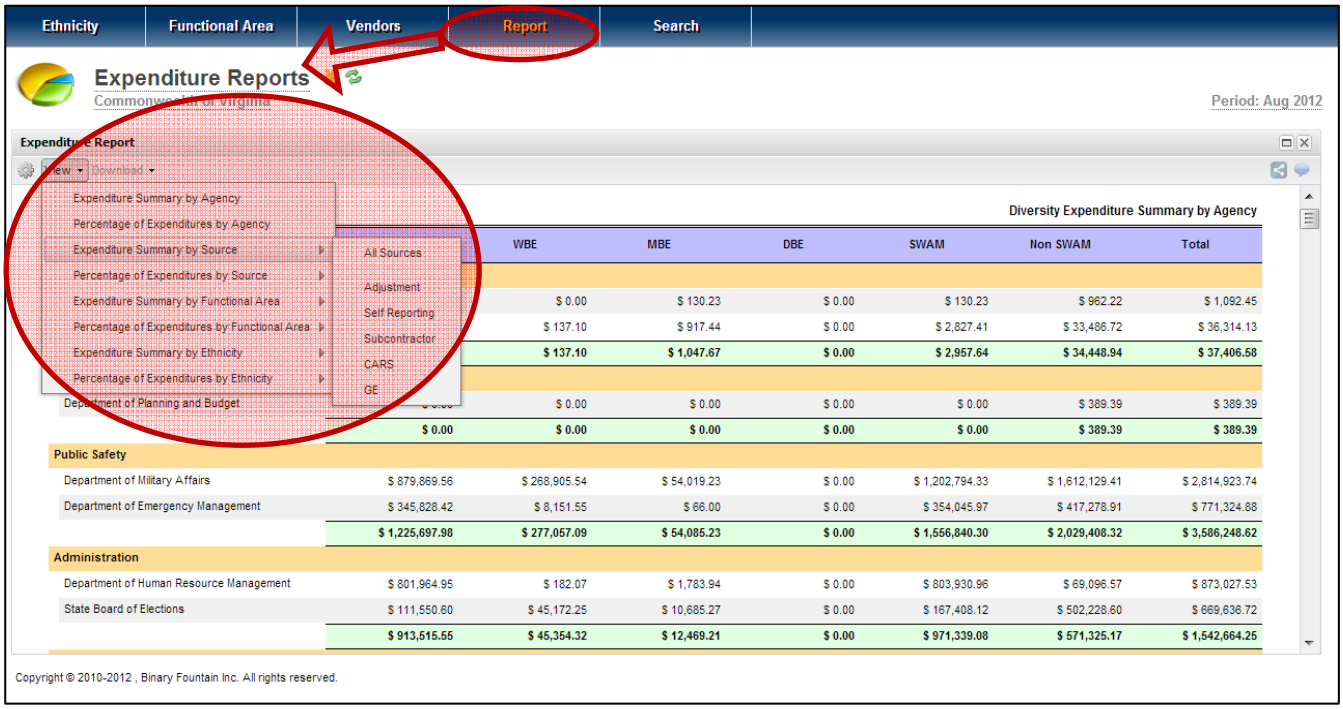
The application is tightly integrated with the SWAM Procurement plan and the dashboard shows the percentage of the current diversity expenditures against their current fiscal goals for all agencies.



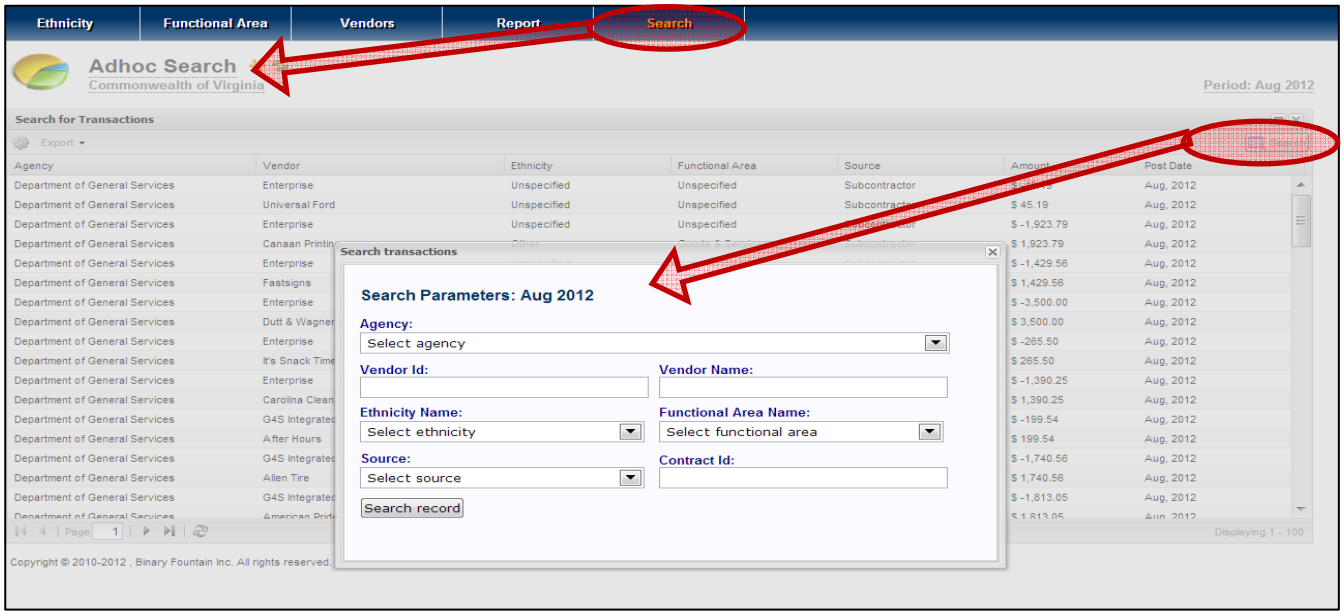
New analysis widgets allow the user to visualize diversity expenditure trends for each secretariat, further broken down by the various vendor classifications. Similar analysis is available based on ethnicity and functional area attributes of the vendors.

Authorized users will also be able to view the expenditure trends by vendor. Trends are available by month, quarter or year based on the period selected.

To view and download the SWaM expenditure in full (All Secretariats) go to the "Report" tab on the DMBE Dashboard. Here, all expenditures for the correlating periods are shown in detail, drilled down by agency with subtotals and totals.



The ad-hoc search tab is located at the farthest right of the tabular area on the dashboard. This will allow authorized users of an agency to see all the detailed expenditures posted according to the period and type of expenditure. The search function for the dashboard is located on the top right hand corner of the reporting area. Once clicked, a pop-up window for search parameters will appear.



Dashboard Data Management

Overview:

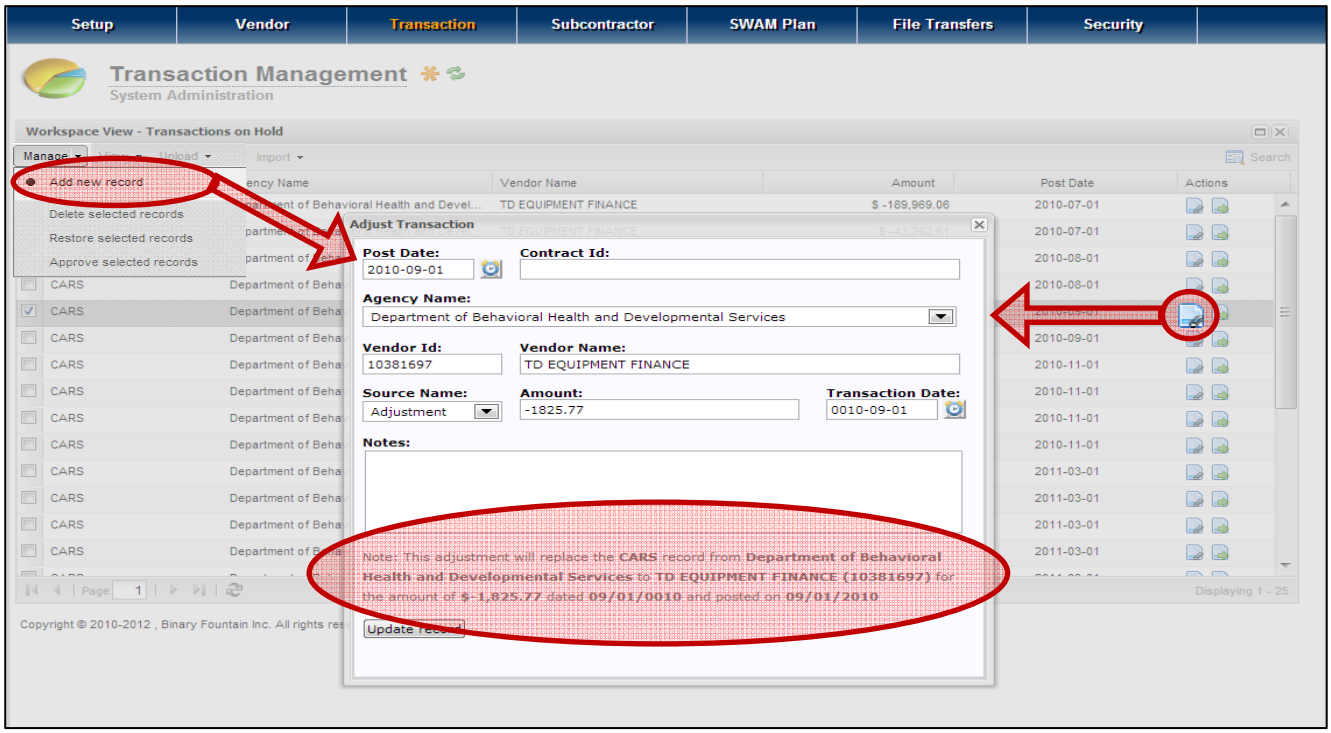
Access to the DMBE dashboard is required for submitting data to the Dashboard and reviewing the agency's detailed transactions.

Subcontracting expenditures are also submitted on the dashboard.

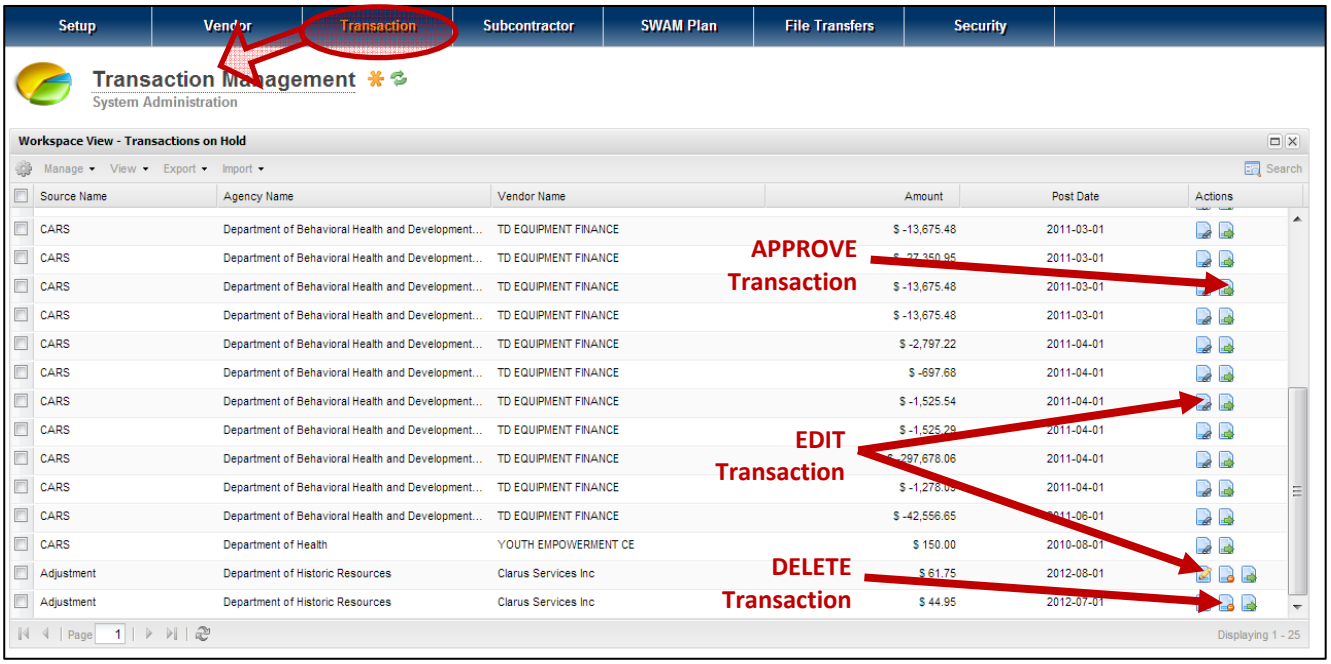
The Dashboard generates SWaM Expenditures monthly and it is done on or nearest to the 20th of each month for the previous month. It is not a real-time system. If April expenditures are reported late, after the refresh date has passed, the amounts will not be automatically included in the posted April expenditures.

Entering Expenditure Data (Self-Reporting)

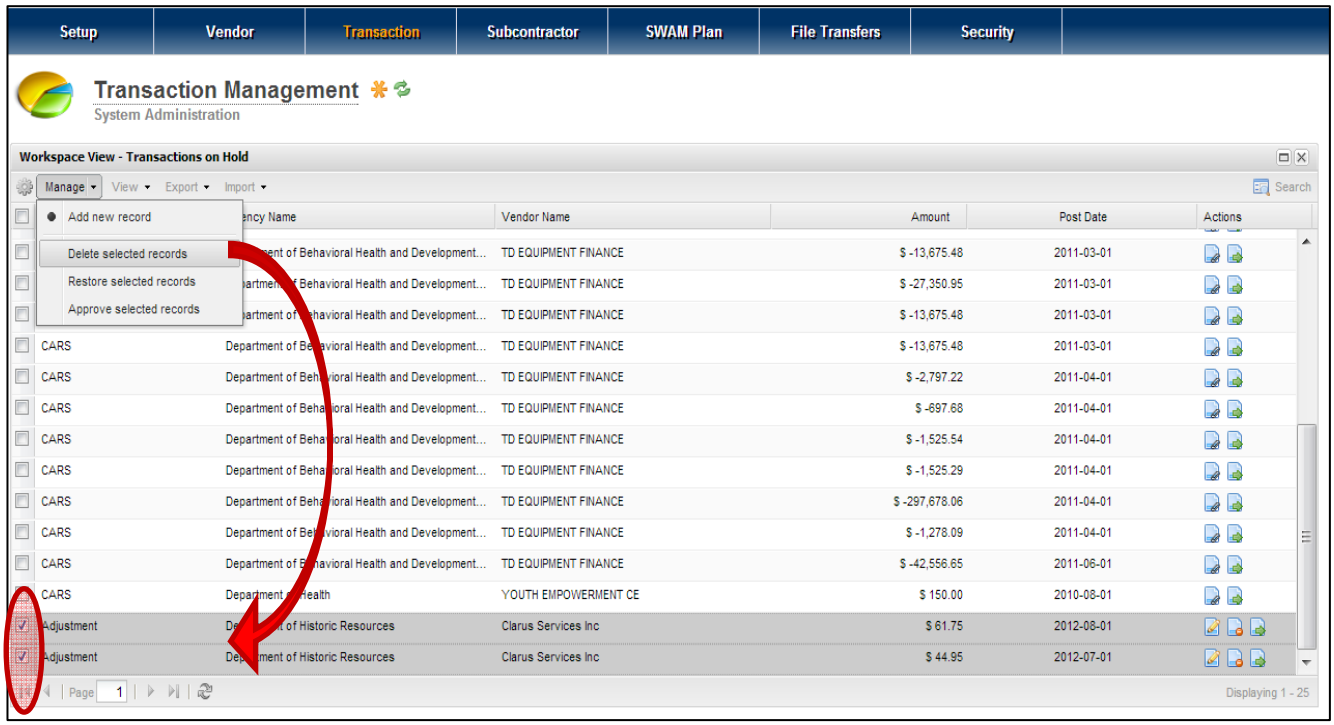
In the "Transactions" area, click on the "Add Record" menu item located on the top left hand side of the Transaction Management screen. A pop-up titled "Add new transaction data" should appear. Fill in all the required data and click "Update Record" to add a new transaction.



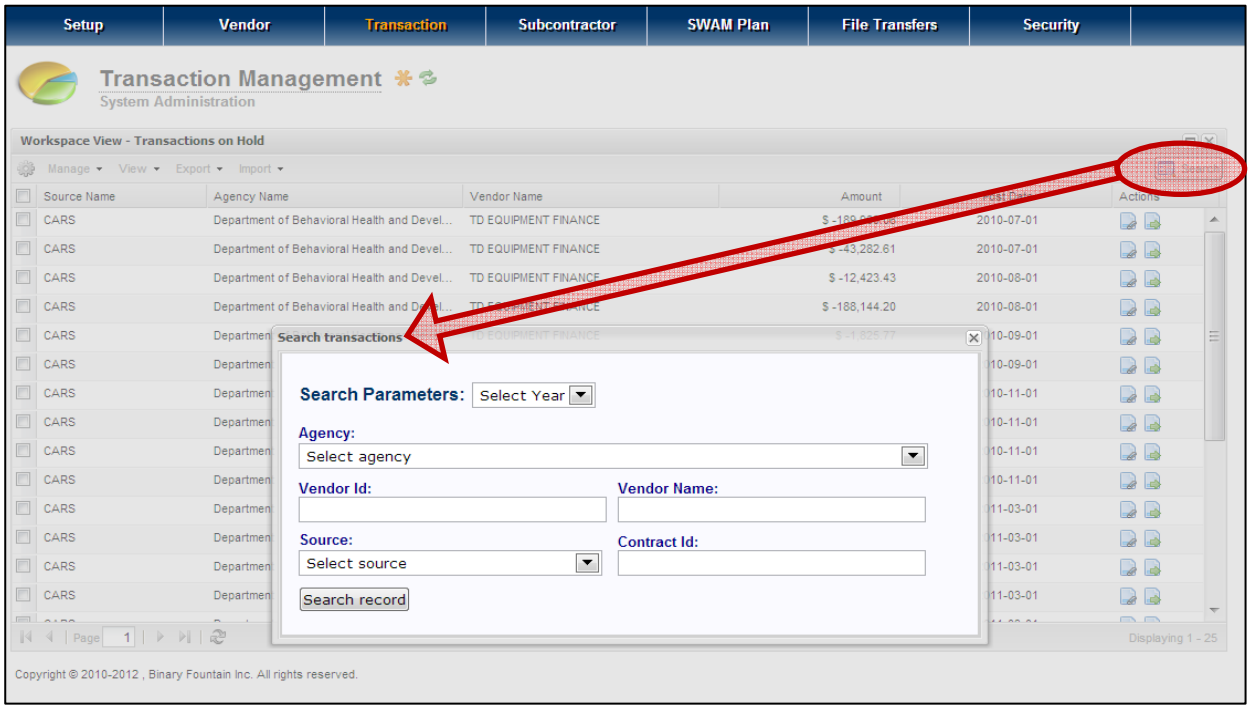
Each transaction also shows a number of actions – you can edit, delete or approve each transaction based on the user credentials.



While it is possible to delete a transaction one at a time, group actions are also possible – the user can delete or approve a selected group of transactions as shown below.

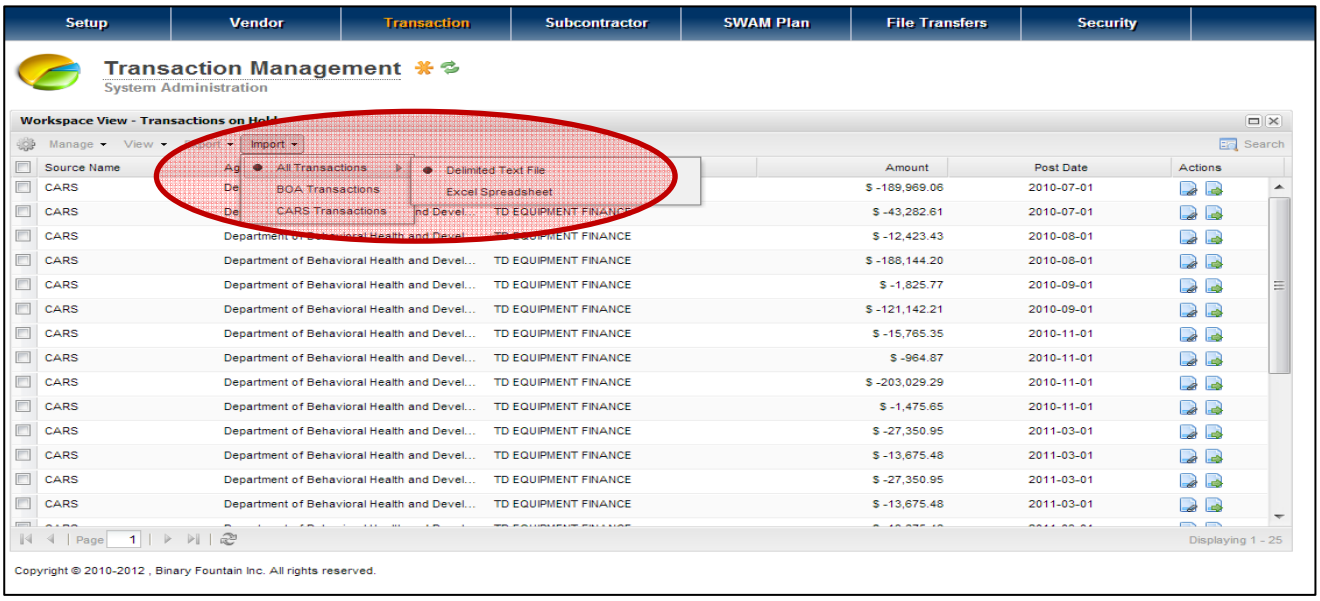


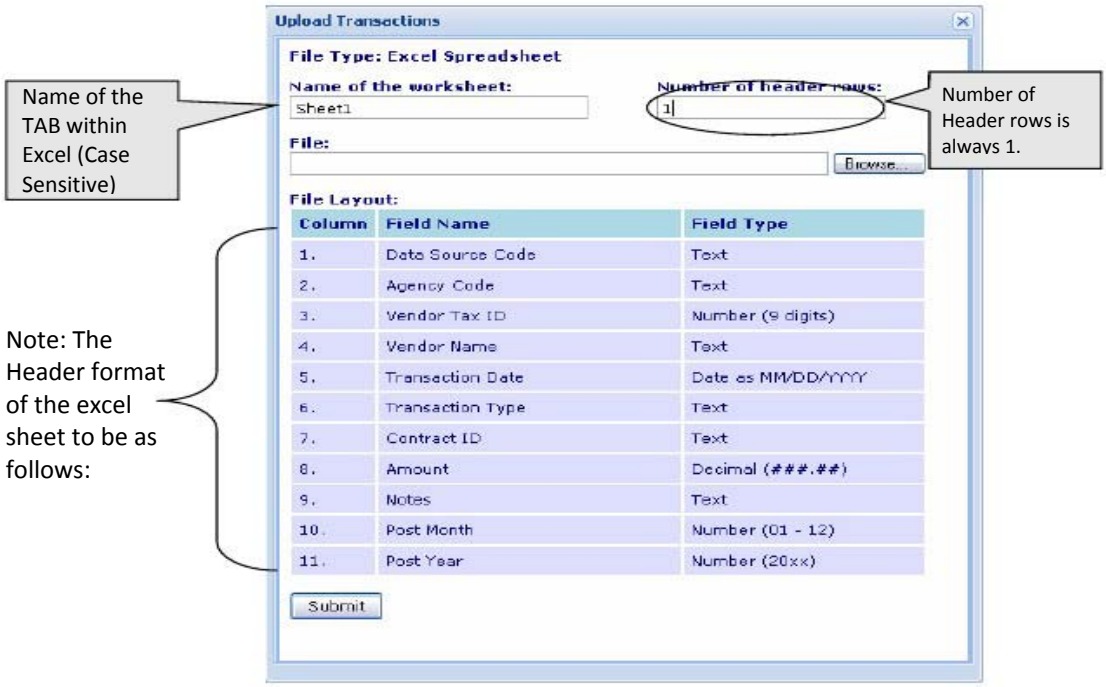
The search function for the transactions is located on the top right hand corner of the transaction management area. Once clicked, a pop-up window will appear to specify search parameters.



Uploading an excel spreadsheet is also another option in entering transactions/self-reporting data. Click the menu called “Upload” in the transaction management screen. Select Excel Spreadsheet. A pop up (below) will appear. Upload the file and click “Submit”.

Once the file is uploaded, the entries will appear in the “Workspace View”. While in the “Workspace View” one is able to edit expenditures that requires editing or correcting, prior to DMBE approval and dashboard refresh.





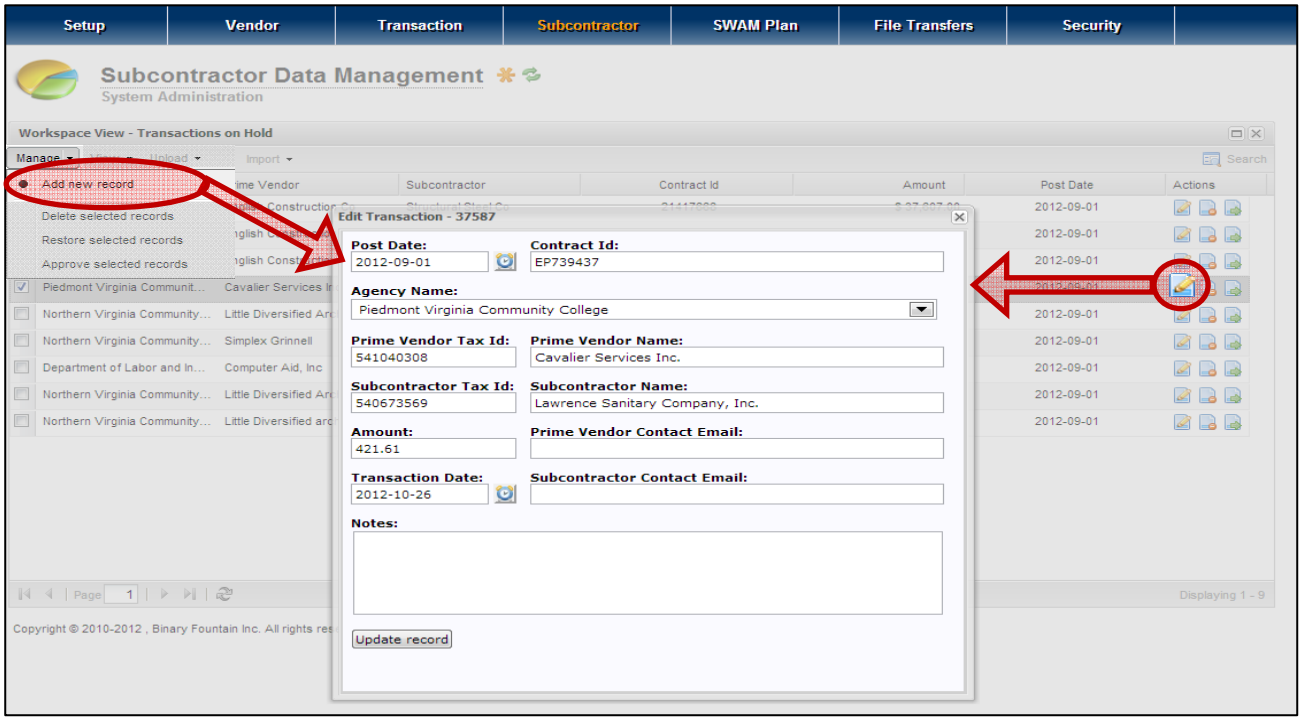
Column	Field Name	Field Type
1.	Data Source Code	Text
2.	Agency Code	Text
3.	Vendor Tax ID	Number (9 digits)
4.	Vendor Name	Text
5.	Transaction Date	Date as MM/DD/YYYY
6.	Transaction Type	Text
7.	Contract ID	Text
8.	Amount	Decimal (###.##)
9.	Notes	Text
10.	Post Month	Number (01 - 12)
11.	Post Year	Number (20xx)

Example: Transaction excel upload

B	C	D	E	F	G	H	I	J	K
Agency Code	Vendor Tax ID	Vendor Name	Transaction Date	Transaction Type	Contract ID	Amount	Notes	Post Month	Post Year
				Unspecified					

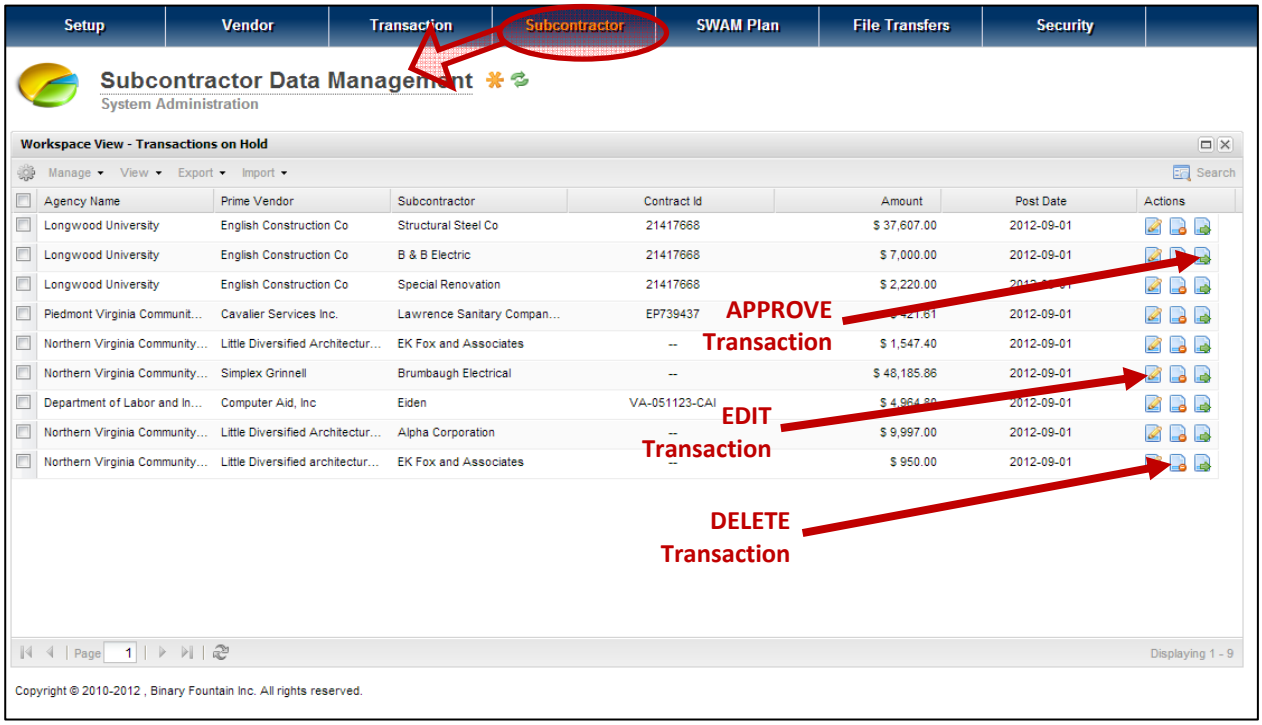
Entering Subcontractor Data

In the "Subcontractor" area, click on the "Add Record" menu item located on the top left hand side of the Subcontractor Data Management screen. A pop-up titled "Add new transaction data" should appear. Fill in all the required data and click "Update Record" to add a new transaction.



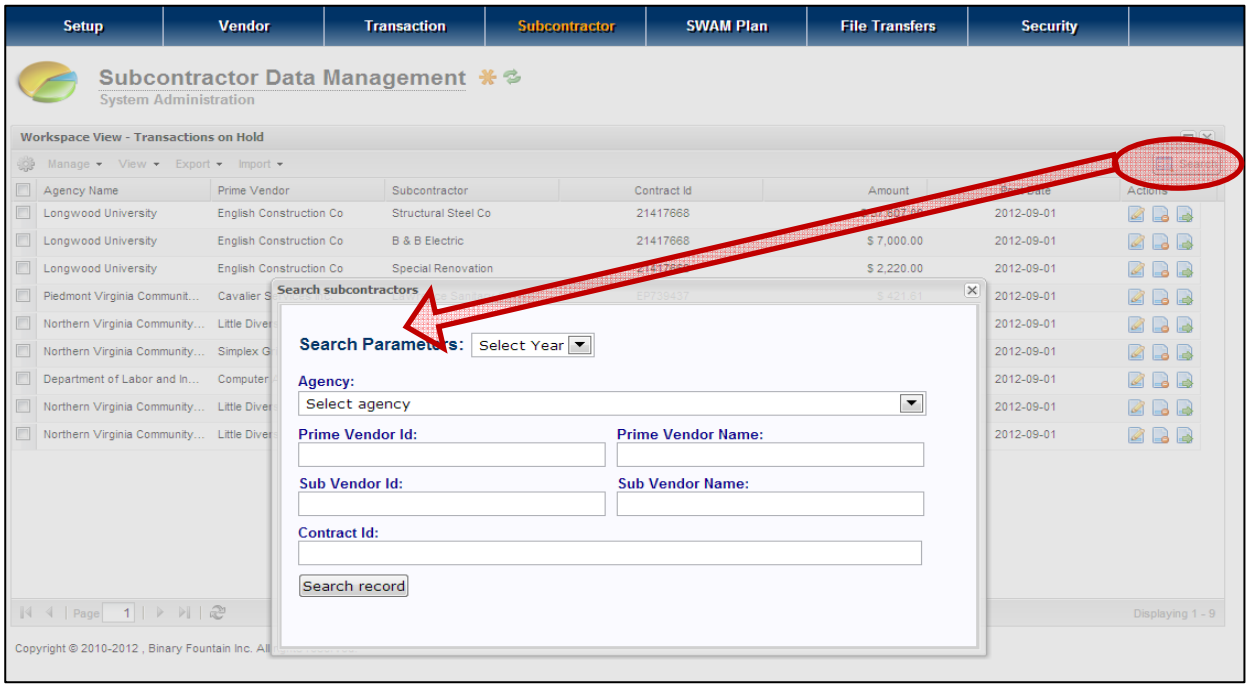
Each subcontractor transaction also supports a number of actions – you can edit, delete or approve each

transaction based on the user credentials.



While it is possible to delete a transaction one at a time, group actions are also possible – the user can delete or approve a selected group of transactions using the menu options similar to the transaction screen.

The search function for the subcontractor transactions is located on the top right hand corner of the transaction management area. Once clicked, a pop-up window will appear to specify search parameters. One or more of these parameters will help to filter the records in the current screen.



Uploading an excel spreadsheet is also another option in entering subcontractor transactions. Click the

menu called “Upload” in the subcontractor data management screen. Select Excel Spreadsheet. A pop up (below) will appear. Upload the file and click “Submit”.

Once the file is uploaded, the entries will appear in the “Workspace View”. While in the “Workspace View” one is able to edit expenditures that requires editing or correcting, prior to DMBE approval and dashboard refresh. The process is similar to the steps in the transaction screen.