covisint
a subsidiary of Compuware Corporation

Using Logistics Dashboard ~ for Buyers
Quick Reference Guide

> **i** Using this quick reference guide assumes that you have obtained a Covisint id and password

Requesting the Logistics Dashboard Application

1. Log in to www.covisint.com

2. Click **Administration Tools** from the left menu bar.

3. Click **Request a Service Package**.

4. Click the **Request** button next to Logistics Dashboard.

5. If required, key in additional information, then click **Request**. You will be contacted via email when your request has been approved by your administrator.

> **RESULT:** You have successfully requested Logistics Dashboard.

Logging in to Logistics Dashboard

1. Navigate to www.covisint.com

2. Key in your User Name and Password, then click **Login**.

3. Click **Logistics Dashboard** from the My Applications menu.

> **RESULT:** You have successfully logged in to Logistics Dashboard.

Setting Your Language and Time Zone Preferences

1. From the Logistics Dashboard view, click **Preferences** tab.

2. From the drop-down menu, select the language in which you wish to view the dashboard.

3. From the drop-down menu, select the time zone in which you are working.

4. Click **Save**.

> **RESULT:** You have successfully configured your preferences.

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Viewing the Materials Summary Tab

1. From the Logistics Dashboard view, click **Materials Summary** tab.

							Past Due Quantity	Months					
Part Number	Supplier	DUNS Number	Shipping Schedule	Date	Plant	Transit		Dec 06	Jan 07	Feb 07	Mar 07	Apr 07	May 07
16245102	DELPHI DELCO ELECTRONICS SYSTEMS	000124727	026100	10/01/2006	72479	0	0	0	0	50	0	50	0

> ℹ️ From this screen, the Buyer is able to evaluate a supplier's record on meeting delivery schedules and to improve supplier delivery timeliness. Buyers are also able to view a forecast of material in transit.

2. Optionally, key in search criteria such as Part Number or Supplier / DUNS number, Ship To, From date and time imported, To date and time imported. Note: The date field is not open. You must select the date from the 📅 calendar icon.

3. Click **Search**. The search results are displayed. At this point you are able to view delivery schedules.

> **RESULT:** You have successfully viewed the Materials Summary tab.

Viewing Transportation Summary

1. From the Logistics Dashboard, click **Transportation Summary** tab.

From this screen, Buyers are able to respond to questions about status from plants. Buyers perform searches on particular shipments and respond to the questions with current status and associated dates. Buyers may also use this screen via the milestone selection criteria to see at what milestones shipments appear to be queuing up.

2. Optionally, key in search criteria such as Shipper Number, Milestone, Ship To, From date and time imported, To date and time imported. You must select the date from the 🗓 calendar icon.

3. Click **Search**. The results are displayed.

4. Enable the checkbox of the item you wish to view.

5. Perform one or more of the following:

If you wish to…	Then…
Manually change milestone data	1. Click on the hyperlinked number in the Shipper Number column. 2. Proceed to the section of this guide entitled *Manually Changing Milestone Data*.
View a historical summary view	1. Click **Summary View**. 2. Proceed to the section of this guide entitled *Viewing Shipment Summary History*.
View shipment details / parts summary	1. Click **Part View**. 2. Proceed to the section of this guide entitled *Viewing Shipment Details / Parts Summary*.
Increase a milestone	1. Click **Increase Milestone**. 2. Confirm increase by clicking **OK**.

RESULT: You have successfully viewed transportation status.

Manually Changing Milestone Data

From this screen, the Buyer is able to view shipment detail information and part detail for a shipper number. The Buyer is also able to change data elements in the open text fields, as well as delete shipments (ASNs) for milestones.

1. From the Transportation Summary screen, click on the *Shipper Number hyperlink* to view the details screen.

2. Modify any of the open text fields as you wish, if authorized to do so. Fields are configured for you during initial setup by the Buyer Company Administrator. If a field is not editable for you, it has been configured that way by the Buyer Company Administrator and is not an error.

3. Click **Update**.

4. Optionally, you may scroll to the bottom of the screen to view Part Level Detail.

> **RESULT:** You have successfully changed milestone data.

Deleting Shipments (ASN) for Milestones $\leq$ 0, 1, 2

1. From the Logistics Dashboard view, click **Shipment Details** tab.

2. Key in the Shipper Number in the open text field.

3. Click **Search**.

4. Click on the *Shipper Number hyperlink* to view the details screen.

5. Click **Delete**.

6. Click **OK** to confirm that you wish to delete.

> **RESULT:** You have successfully deleted shipments for milestones $\leq$ 0, 1, 2

Adding a Note to the Shipment Details Screen

1. From the Shipment Details screen for a given shipper number, click **Notes**.

2. Key in the text in the "note" window, then click **Save**.

> **RESULT:** You have successfully added a note to the shipment details screen.

Viewing Shipment Summary History

> From this screen, the Buyer is able to address plant questions regarding a shipment.   The Buyer is also able to evaluate Freight Forwarder performance with respect to dates, milestone operations, etc.

1. From the Logistics Dashboard view, click **Transportation Summary** tab.

2. Enable the checkbox of the item you wish to view.

3. Click **Summary View**. An historical view of shipment details for the selected shipper number is displayed.

4. Optionally, sort the results displayed by clicking ▼ in the column header.

> **RESULT:**   You have successfully viewed shipment summary history.

Viewing Shipment Details / Parts Summary

> From this screen, the Buyer is able to use this screen to see if a part number were contained in a given shipment, as well as the quantity of that part number.

1. From the Logistics Dashboard view, click **Shipment Details** tab.

> **RESULT:**   You have successfully viewed shipment details / parts summary.

Adding Users to a Company Profile

> ⚠️ Users must have already been approved in Covisint CCA for the Logistics tool in order to be selected as a user in these steps. Refer to the section entitled "*Requesting the Logistics Dashboard Application*" for further details.

1.   From the Logistics Dashboard view, click **Administration** tab.

2.   Key in the company to which you wish to add a user in the open text box, then click **Search**.

3.   From the results list, enable the radio button of the company and click **Select**.

4.   Key in the user ID of the user you wish to add, then click **Add User**.

> ℹ️ For help in validating the user ID belongs to the user you wish to add, key in the user ID, then click the icon: User ID   The system confirms the user associated to that user ID.
>
> jsmith ❓

> **RESULT:**   You have successfully added a user to a company profile.

Configuring Roles per Company Type

1.   From the Logistics Dashboard view, click **Administration** tab.

2.   From the Administration menu, click **Assign Role Types**.

3.   Select the *User Role* you wish to configure from the drop down menu. The privileges matrix is displayed.

4.   Enable the checkbox of each privilege you wish to assign per milestone for this role type.

> ℹ️ If you wish the privilege to apply to all milestones, enable the checkbox in the **All** column.

5.   Click **Update**.

> **RESULT:**   You have successfully configured privileges for role(s) per company type.