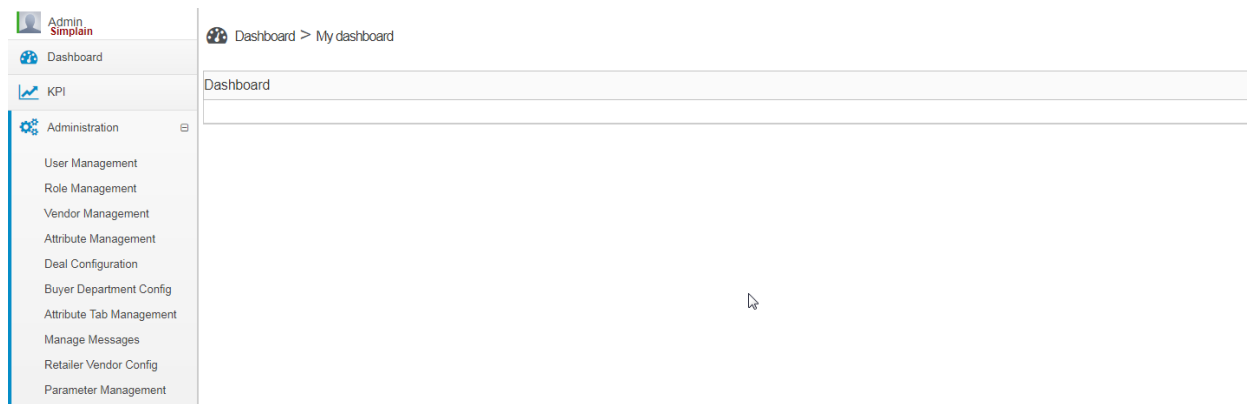


Vendor Portal – User Manual Administration Module

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Administration Module



Above is the view of Administration Menu.

Admin user will have access to the following Administration functions

- 1. User Management**
Allows Add, edit or delete user with and without User Request from the homepage.
- 2. Role Management**
Role Management is a group of authorities which include Add and Edit roles. For example, a buyer role has authority to add item, approve item, delete item etc.
- 3. Vendor Management**
Vendor Management allows individual vendors to enabled/disabled.
- 4. Attribute Management**
Attribute Management allows managing attributes of the user.
- 5. Deal Configuration**
Deal Configuration allows user to modify the existing deal.
- 6. Buyer Department Config**
Buyer Department Config allows user to modify the Department associated with buyer and buyer type.
- 7. Attribute Tab Management**
Attribute Tab Management allows user to create new tab to link to grids.
- 8. Retailer Vendor Config**
Retailer vendor config allows user to link the vendors to retailer user.

1. User Management

User Management
Add, edit or delete users

ACTIVE
 INACTIVE

#	ID	Username	Name	Email	Email Confirmed?	Active	Company Name	Created Date	Created By	State
1	+ 1041	lsourcing	LuisSourcing	fake@fake.com	Yes	Yes	Fake	3/18/2016 3:3...	admin	Active
2	+ 1001	sourcing	sourcing	weichen@simplain.com	Yes	Yes	simplain test 1	3/4/2016 11:2...	admin	Active
3	+ 982	jayvendor	JayVendor	jay.gorrell@disney1.c...	Yes	Yes	JayVendor	2/29/2016 10:...	jerryadmin	Active
4	+ 981	jaybuyer	JayBuyer	jay.gorrell@disney.com	Yes	Yes	JayBuyer	2/29/2016 10:...	jerryadmin	Active
5	+ 961	hedgj002vg	JerryVenGen	jerryvengen@noreply...	Yes	Yes	JerryVenGen	2/15/2016 11:...	jerryadmin	Active
6	+ 941	tmplli7f	Maria Galindo	maria.galindo.lopez@...	No	No	Accenture	2/12/2016 9:1...	REQUESTED	Pending
7	+ 921	jerrysuper	JerrySuper	jerrysuper@disney1.c...	Yes	Yes	JerrySuper	2/9/2016 10:2...	jerryadmin	Active
8	+ 903	superluis	LuisFrias	fake@mail.com	Yes	Yes	Accenture	2/10/2016 2:5...	REQUESTED	Active
9	+ 902	galasuper	MariaGalindo	maria.x.galindo.-nd@...	Yes	Yes	Accenture	2/10/2016 2:4...	REQUESTED	Active
10	+ 901	susantadmin	SusanTAdmin	susanadmin@disney1...	Yes	Yes	SusanTAdmin	2/8/2016 9:48...	jerryadmin	Active

- User can hide/unhide extra columns as per the need

Administrators use User Management screen to

1. View the current status of the user
2. Search for a user
3. Add New user
4. Edit existing user
5. Delete existing user
6. Pie chart for status filter

1.1 Search User

Admin can search User Information by giving different search criteria like User Name, Name, Email, ID.

User Management
Add, edit or delete users

ACTIVE
 INACTIVE

#	ID	Username	Name	Email	Email Confirmed?	Active	Company Name	Created Date	Created By	State
1	+ 981	jaybuyer	JayBuyer	jay.gorrell@disney.com	Yes	Yes	JayBuyer	2/29/2016 10:...	jerryadmin	Active
2	+ 961	hedgj002vg	JerryVenGen	jerryvengen@noreply...	Yes	Yes	JerryVenGen	2/15/2016 11:...	jerryadmin	Active
3	+ 921	jerrysuper	JerrySuper	jerrysuper@disney1.c...	Yes	Yes	JerrySuper	2/9/2016 10:2...	jerryadmin	Active

1.2 Add New User

User Information is entered in the below tabs of Add New User

1. Account

2. Profile
3. Contacts
4. Access
5. Attributes
6. Notification

Account tab

The screenshot shows a web form titled "Add New User" with a close button (X) in the top right corner. Below the title is a subtitle: "Use the following form to add a new user to the system." The form has a tabbed interface with six tabs: "Account" (selected), "Profile", "Contacts", "Access", "Attributes", and "Notifications". The "Account" tab contains the following fields and controls:

- Username:** A text input field containing "paravthy" with a green checkmark on the right.
- Password:** A password input field with masked characters (dots) and a green checkmark on the right.
- Change password at next logon?:** A dropdown menu with "YES" selected.
- Active:** A dropdown menu with "YES" selected.
- Active Until:** A date input field with the placeholder "MM/DD/YYYY".
- Manager:** A dropdown menu with a downward arrow.

Below the "Manager" field is the text "Enter this user's manager." At the bottom right of the form are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

- Admin can create username and password for the user in Account tab.
- If administrators set "Change password at next logon?" option to "Yes", user will be forced to change the password on their next login.
- User account can be deactivated by changing "Active" option to "No", and account is activated by changing "Active" option to "Yes"
- User account can be expired by specifying a date in Active until. The account will be deactivated automatically on that date.
- User's manager selection also allowed here
- *Pressing escape (ESC) on the keyboard will cancel the changes without any warning.

Profile tab

The screenshot shows the 'Add New User' form with the 'Profile' tab selected. The form has a title bar with a plus icon and the text 'Add New User', and a close button (X) in the top right corner. Below the title bar is a subtitle: 'Use the following form to add a new user to the system.' The form is divided into six tabs: 'Account', 'Profile' (selected), 'Contacts', 'Access', 'Attributes', and 'Notifications'. The 'Profile' tab contains the following fields: 'Name' with the value 'parvathy' and a green checkmark; 'Email' with the value 'parvathy@sim.com' and a green checkmark; 'Email Confirmed?' with a 'YES' button and a dropdown arrow; and 'Company Name' with the value 'simplain' and a green checkmark. At the bottom right are 'Save' and 'Cancel' buttons.

- User's profile name, contact email and company name are required under this tab
- Profile name and Company name will be displayed on the screen top left after user logged in.
- Initially "Email Confirmed?" is set to "No" so that an email is sent to the given email address with a link to activate the account.

Contacts tab

The screenshot shows the 'Add New User' form with the 'Contacts' tab selected. The form has the same title bar and subtitle as the previous screenshot. The 'Contacts' tab contains the following fields: 'Cell Phone', 'Home Phone', and 'Work Phone' (all empty text boxes); 'Address Line1' and 'Address Line2' (empty text boxes); 'City' (empty text box); 'State' (a dropdown menu with 'Click to select' and a downward arrow); and 'Zipcode' (empty text box). At the bottom right are 'Save' and 'Cancel' buttons.

- The information/details requested here are not mandatory but if Address Line 1 is entered then City, State and Zip code are required.

Access tab

Add New User

Use the following form to add a new user to the system.

Account
Profile
Contacts
Access
Attributes
Notifications

<input type="checkbox"/>	Role	Description
<input checked="" type="checkbox"/>	+ ADMIN	Admin Role. Users assigned to this role will be re...
<input type="checkbox"/>	+ BUYER	BUYer with all buyer permissions
<input type="checkbox"/>	+ BUYER - GENERAL	Buyer - General
<input type="checkbox"/>	+ BUYER - NUTRITION & ALLERGEN	Buyer - Nutrition & Allergen
<input type="checkbox"/>	+ BUYER - SAFETY	Buyer - Safety
<input type="checkbox"/>	+ SOURCING	Sourcing role, sources items before buyer approve...
<input type="checkbox"/>	+ SUPER ADMIN	Super Admin has access to all screens as Vendor...
<input type="checkbox"/>	+ VENDOR	Vendor role with all permissions
<input type="checkbox"/>	+ VENDOR - GENERAL	Vendor - General
<input type="checkbox"/>	+ VENDOR - NUTRITION & ALLER...	Vendor - Nutrition & Allergen
<input type="checkbox"/>	+ VENDOR - SAFETY	Vendor - Safety

✓ Save

✗ Cancel

- Roles can be assigned to the user in this tab and it allows multiple selections.
- Roles can be expanded to view the authorities defined under it.
- *User Roles shown above will be different for each implementation.

Attributes tab

+ Add New User

X

Use the following form to add a new user to the system.

AccountProfileContactsAccessAttributesNotifications

Vendor

X

NO

Click to select

Buyer-Department

YES

✓

[3] Surgele - [1] ALL USERS X |

Save

Cancel

- A user can be a vendor user/buyer user/admin
- Admin users will not be assigned any Attributes
- Vendor user can be assigned one or more vendors and similarly buyer can be associated to one or more buyers.

Notification tab

+ Add New User

Use the following form to add a new user to the system.

Account Profile Contacts Access Attributes **Notifications**

Notify me when my items/deals/ads change ☒ OFF

✓ Save ✕ Cancel

- Automatic notification will be sent to the user email address when their items/deals/ads change. By default, it is set “Off”

1.3 Edit User

User can edit any user information with Edit option. The same add new user rule applies here.

User Management
Add, edit or delete users

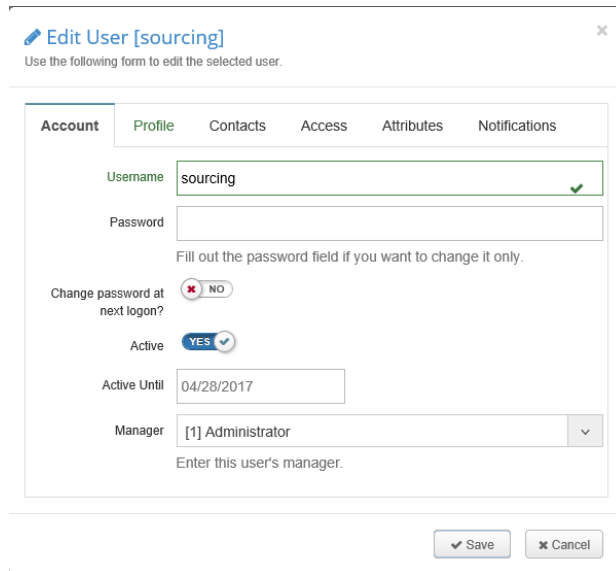
87 % ACTIVE 12 % INACTIVE

Edit selected record

✕ Add New ✎ Edit ✕ Delete

#	ID	Username	Name	Email	Email Confirmed?	Active	Company Name	Created Date	Created By	State
1	1041	lsourcing	LuisSourcing	fake@fake.com	Yes	Yes	Fake	3/18/2016 3:3...	admin	Active
2	1001	sourcing	sourcing	weichen@simplain.com	Yes	Yes	simplain test 1	3/4/2016 11:2...	admin	Active
3	982	jayvendor	JayVendor	jay.gorrell@disney1.c...	Yes	Yes	JayVendor	2/29/2016 10:...	jerryadmin	Active
4	981	jaybuyer	JayBuyer	jay.gorrell@disney.com	Yes	Yes	JayBuyer	2/29/2016 10:...	jerryadmin	Active
5	961	hedgj002vg	JerryVenGen	jerryvengen@noreply...	Yes	Yes	JerryVenGen	2/15/2016 11:...	jerryadmin	Active

Modify any user details and save the changes.



Edit User [sourcing]
Use the following form to edit the selected user.

Account | Profile | Contacts | Access | Attributes | Notifications

Username: ✓

Password:

Fill out the password field if you want to change it only.

Change password at next login? ☒ NO

Active: ☒ YES

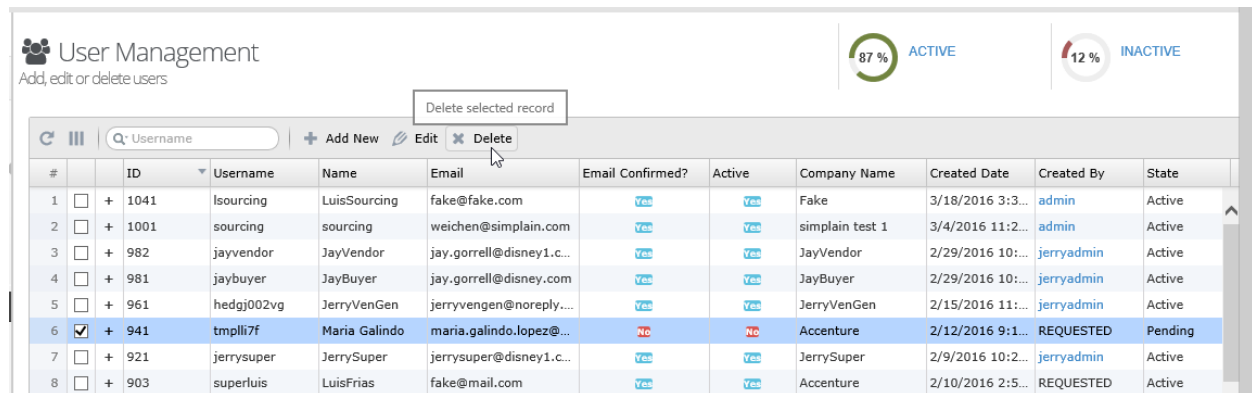
Active Until:

Manager: ▼

Enter this user's manager.

1.4 Delete User

We do not recommend user deletion instead you can deactivate the account by selecting the Active flag to 'No' in Edit User.



User Management
Add, edit or delete users

87 % ACTIVE | 12 % INACTIVE

Q: Username | + Add New | Edit | Delete (Delete selected record)


#	ID	Username	Name	Email	Email Confirmed?	Active	Company Name	Created Date	Created By	State
1	+ 1041	lsourcing	LuisSourcing	fake@fake.com	Yes	Yes	Fake	3/18/2016 3:3...	admin	Active
2	+ 1001	sourcing	sourcing	weichen@simplain.com	Yes	Yes	simplain test 1	3/4/2016 11:2...	admin	Active
3	+ 982	jayvendor	JayVendor	jay.gorrell@disney1.c...	Yes	Yes	JayVendor	2/29/2016 10:...	jerryadmin	Active
4	+ 981	jaybuyer	JayBuyer	jay.gorrell@disney.com	Yes	Yes	JayBuyer	2/29/2016 10:...	jerryadmin	Active
5	+ 961	hedgj002vg	JerryVenGen	jerryvengen@noreply...	Yes	Yes	JerryVenGen	2/15/2016 11:...	jerryadmin	Active
6	+ 941	tmpli7f	Maria Galindo	maria.galindo.lopez@...	No	No	Accenture	2/12/2016 9:1...	REQUESTED	Pending
7	+ 921	jerrysuper	JerrySuper	jerrysuper@disney1.c...	Yes	Yes	JerrySuper	2/9/2016 10:2...	jerryadmin	Active
8	+ 903	superluis	LuisFrias	fake@mail.com	Yes	Yes	Accenture	2/10/2016 2:5...	REQUESTED	Active

- Admin user cannot be deleted and the 'Delete' button will be disabled for this user.
- If the selected user is Manager of the other users, then system will prompt the admin to reassign the users under this Manager user and proceed to delete.
- Delete the user which allows after confirmation.

2. Role Management

Role Management module helps to add, edit or delete roles.

English (US)

 Security Roles

>Add or Edit roles

</

2.1 Search Role

Admin can search User Role Information by giving different search criteria like Name, Description, ID.

Security Roles

>Add or Edit roles

Add New
 Edit
 Delete

#		<div> <input checked="" type="radio"/> Name <input type="radio"/> Description <input type="radio"/> ID </div>	Name	Description	Created Date	Created By
1	<input type="checkbox"/>		SOURCING	Sourcing role, sources items before buyer approves items.	3/4/2016 11:23 pm	admin
2	<input type="checkbox"/>		SUPER ADMIN	Super Admin has access to all screens as Vendor and Buyer, and admin modul...	1/30/2016 1:42 am	admin
3	<input type="checkbox"/>		VENDOR - SAFETY	Vendor - Safety	12/15/2015 6:30 am	admin
4	<input type="checkbox"/>	+	VENDOR - NUTRITION & ALLERGEN	Vendor - Nutrition & Allergen	12/15/2015 6:30 am	admin
5	<input type="checkbox"/>	+	VENDOR - GENERAL	Vendor - General	12/15/2015 6:30 am	admin

2.2 Add New Role

To create a new role, need to specify details under General and Permissions tab

General Tab:

+ Add New Role [X]

Use the following form to add a new role to the system.

General

Permissions

Name: NEW ROLE ✓

Enable: YES ✓

Description: New role for testing

[Save] [Cancel]

- Roles are identified by a unique name.
- It is recommended to provide a detailed description for each Role, and Roles can be disabled until ready.

Permissions Tab:

+ Add New Role

Use the following form to add a new role to the system.

General **Permissions**

Module	Permissions
- ITEM MANAGEMENT	0 / 33
<input type="checkbox"/> Authority	Description
<input type="checkbox"/> ADD_ITEM	Add new item.
<input type="checkbox"/> APPROVE_ITEM	Permission for approving the item.
<input type="checkbox"/> APPROVE_ITEM	Approve items.
<input type="checkbox"/> APPROVE_ITEM_ATTRI	Permission for approving item attribute.
<input type="checkbox"/> APPROVE_ITEM_FS	Permission for approving item food safety.
<input type="checkbox"/> APPROVE_ITEM_NUTRI	Permission for approving item nutrition.
<input type="checkbox"/> APPROVE_ITEM_OA	Permission to approve the orderable assortm
<input type="checkbox"/> APPROVE_ITEM_UPLOAD	Permission for approving item upload
<input type="checkbox"/> DB_COST_832	Dashboard for 832 Cost

Save **Cancel**

- Under Permissions tab subset or all the authorities under multiple modules can be selected to define the permissions of the role.

2.3 Edit Role

Similar to edit user, any role information can be modified here.

Security Roles
Add or Edit roles

Q: Name **+ Add New** **Edit** **Delete**

#	ID	Name	Description	Created Date	Created By
1	<input checked="" type="checkbox"/> + 481	SOURCING	Sourcing role, sources items before buyer approves items.	3/4/2016 11:23 pm	admin
2	<input type="checkbox"/> + 461	SUPER ADMIN	Super Admin has access to all screens as Vendor and Buyer, and admi...	1/30/2016 1:42 am	admin
3	<input type="checkbox"/> + 392	VENDOR - SAFETY	Vendor - Safety	12/15/2015 6:30 am	admin

Edit Role [ID=481]
Use the following form to edit the selected role.

General **Permissions**

Module	Permissions
<input type="checkbox"/> EDIT_ITEM	Edit items informations.
<input type="checkbox"/> EDIT_ITEM_ATTRI	Permission for editing item attribute
<input type="checkbox"/> EDIT_ITEM_FS	Permission for editing item food safety
<input type="checkbox"/> EDIT_ITEM_NUTRI	Permission for editing item nutrition.
<input type="checkbox"/> EDIT_ITEM_OA	Permission to editing the orderable assortm...
<input type="checkbox"/> EDIT_ITEM_UPLOAD	Permission for editing Item upload.
<input checked="" type="checkbox"/> ITMREQ_EDIT	Request Item, just for Disney user.
<input checked="" type="checkbox"/> REJECT_ITEM	Reject items.
<input checked="" type="checkbox"/> REVIEW_ITEM	Review Item before buyer approves
<input type="checkbox"/> UPLOAD_ITEM	Upload items using a spreadsheet.
<input checked="" type="checkbox"/> VIEW_ADD_COMMENTS_TAB	Access to Item Uploads Tab.
<input checked="" type="checkbox"/> VIEW_ITEM	Add new item.

Save Cancel

2.4 Delete Role

Upon selecting a role, delete button will be enabled which allows role deletion after a confirmation.

Security Roles
>Add or Edit roles

Delete selected records

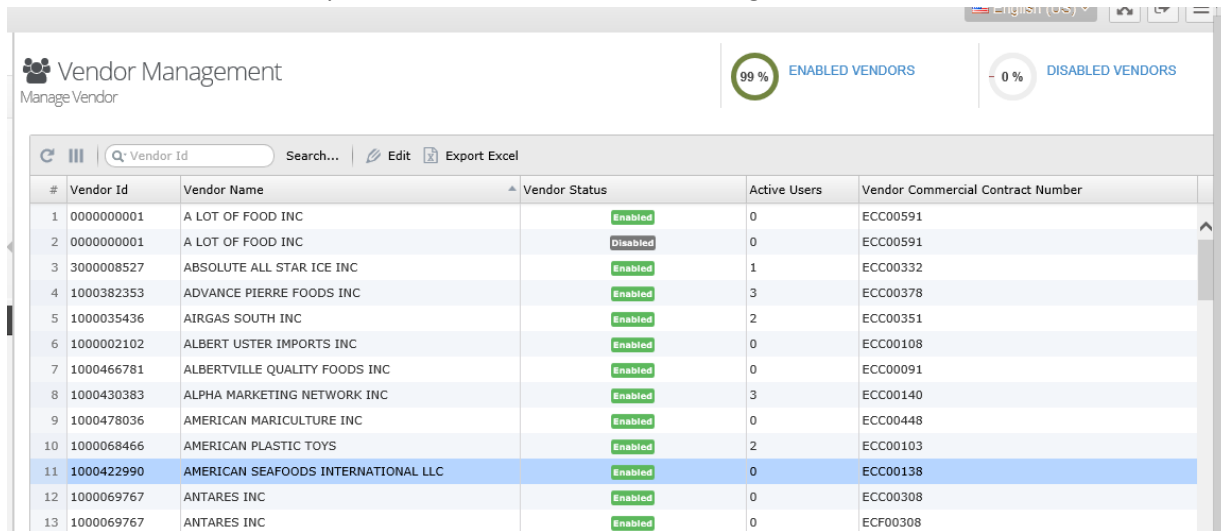
Q: Name + Add New Edit Delete

#	ID	Name	Description	Created Date	Created By
1	<input checked="" type="checkbox"/> + 481	SOURCING	Sourcing role, sources items before buyer approves items.	3/4/2016 11:23 pm	admin
2	<input type="checkbox"/> + 461	SUPER ADMIN	Super Admin has access to all screens as Vendor and Buyer, and admi...	1/30/2016 1:42 am	admin
3	<input type="checkbox"/> + 392	VENDOR - SAFETY	Vendor - Safety	12/15/2015 6:30 am	admin
4	<input type="checkbox"/> + 391	VENDOR - NUTRITION & ALLERGEN	Vendor - Nutrition & Allergen	12/15/2015 6:30 am	admin
5	<input type="checkbox"/> + 390	VENDOR - GENERAL	Vendor - General	12/15/2015 6:30 am	admin

- If the selected role is assigned to any users, then the system will prompt to reassign the users to other roles and proceed to deletion.

3. Vendor Management

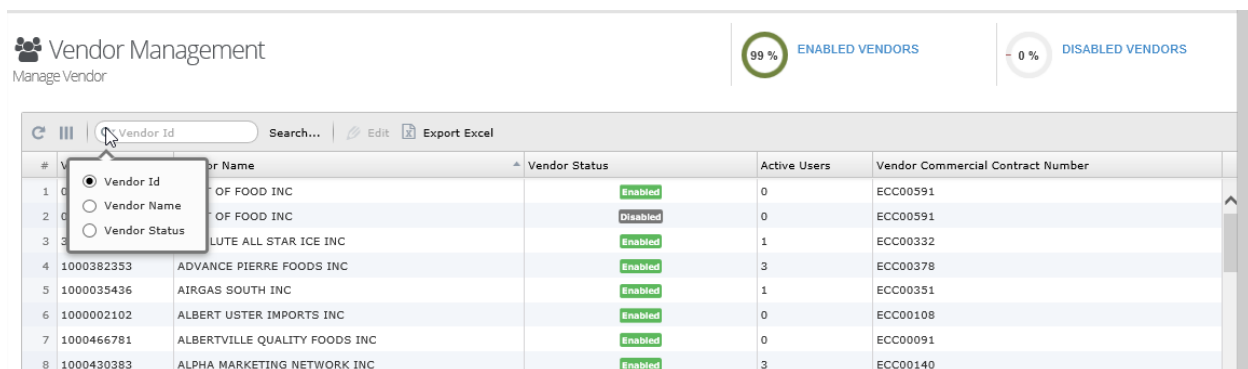
We can search, edit and export vendor details in vendor management screen.



#	Vendor Id	Vendor Name	Vendor Status	Active Users	Vendor Commercial Contract Number
1	0000000001	A LOT OF FOOD INC	Enabled	0	ECC00591
2	0000000001	A LOT OF FOOD INC	Disabled	0	ECC00591
3	3000008527	ABSOLUTE ALL STAR ICE INC	Enabled	1	ECC00332
4	1000382353	ADVANCE PIERRE FOODS INC	Enabled	3	ECC00378
5	1000035436	AIRGAS SOUTH INC	Enabled	2	ECC00351
6	1000002102	ALBERT USTER IMPORTS INC	Enabled	0	ECC00108
7	1000466781	ALBERTVILLE QUALITY FOODS INC	Enabled	0	ECC00091
8	1000430383	ALPHA MARKETING NETWORK INC	Enabled	3	ECC00140
9	1000478036	AMERICAN MARICULTURE INC	Enabled	0	ECC00448
10	1000068466	AMERICAN PLASTIC TOYS	Enabled	2	ECC00103
11	1000422990	AMERICAN SEAFOODS INTERNATIONAL LLC	Enabled	0	ECC00138
12	1000069767	ANTARES INC	Enabled	0	ECC00308
13	1000069767	ANTARES INC	Enabled	0	ECF00308

3.1 Search vendor

User can search a vendor based on different search criteria like Vendor ID, Vendor Name or Vendor Status



#	Vendor Id	Vendor Name	Vendor Status	Active Users	Vendor Commercial Contract Number
1	0000000001	A LOT OF FOOD INC	Enabled	0	ECC00591
2	0000000001	A LOT OF FOOD INC	Disabled	0	ECC00591
3	3000008527	ABSOLUTE ALL STAR ICE INC	Enabled	1	ECC00332
4	1000382353	ADVANCE PIERRE FOODS INC	Enabled	3	ECC00378
5	1000035436	AIRGAS SOUTH INC	Enabled	1	ECC00351
6	1000002102	ALBERT USTER IMPORTS INC	Enabled	0	ECC00108
7	1000466781	ALBERTVILLE QUALITY FOODS INC	Enabled	0	ECC00091
8	1000430383	ALPHA MARKETING NETWORK INC	Enabled	3	ECC00140