Tenant Management System (TMS)

TABLE OF CONTENTS

About this Guide

Purpose

This user guide enables TMS users to get acquainted with the application and use it effectively for the following:

- Create users at tenant level.
- Create custom roles for the users and assign the roles to the users.
- Customize the company's security and display settings.
- Generate and schedule reports for your company, users, roles, and activities.
- Configure master data (currencies, countries, states, UoM, exchange rates, address, location, category, payment terms, organizational units, and procurement scope) for your company.

Audience Profile

The intended audience for this guide are anyone managing the user configuration for the given tenant.

Manual at a glance

This user guide has been divided into the following chapters:

- **Chapter 1: Welcome to TMS**

  This chapter gives an overview of the TMS application. It also discusses the key features and benefits of the TMS.

- **Chapter 2: User Management**

  This chapter provides information on how to create users and user groups for a tenant as well as describes directions to bulk upload users for a tenant.

- **Chapter 3: Role Management**

  This chapter provides information on how the TMS admin can create a custom role as required by clubbing few activities, for a product. This chapter also provides direction to assign a role to existing active users in the tenant.

- **Chapter 4: Company Preferences**

  This chapter provides company configurations which can be twitched by the TMS admin as per the tenant requirement.

- **Chapter 5: Reports**

  This chapter provides information on how to create and share custom reports. The chapter also specifies how to use the pre-canned reports provided by Zycus.

- **Chapter 6: Master Data**

This chapter provides direction on how to configure master data such as currencies, countries, states, UoM, exchange rates, address, location, category, payment terms, organizational units, and procurement scope for your tenant and users.

Chapter 1. Welcome to Tenant Management System (TMS)

Introduction

Tenant Management System (TMS) is an application which maintains the company users, user roles, and product access. TMS helps to configure and manage the data to be visible on the products. The TMS admin can configure access permissions for their users. The TMS admin can also configure which functionality of a product will be accessible to which user or role, providing high configuration parameters to manage the products, users, and what activities users are allowed to perform. It also has the functionality to generate reports to check the functioning of products and tenants.

Roles

The TMS access role is provided only to the Company Admin and they can thus create users and user roles for different products as well as manage the product admins as well as assign roles and activities to them.

Key Features of Tenant Management System

TMS provides highly configurable functionalities to maintain the products, users, and user activities for a particular tenant:

- **User Management:**
  - Creating new users and manage existing users.
  - Assign products to each user.
  - Assign roles and activities a user can perform on a particular product.
  - Create user groups to provide the same functionality to a set of users.
  - Activate and deactivate a user, as per requirement.

- **Role Management:**
  - Creating custom roles which contain a set of activities defined, per product.
  - Assign these roles to the created users.

- **Company Preferences:**
  - Configuring the company’s security settings.
  - Configuring the company’s display settings like time zone, number format, date format, time format, default currency, locale, fiscal year date range, logo, email settings, and support settings.

- **Reports:**
  - Generating and extracting reports based on various parameters.
  - Scheduling timely reports to view the information over the time.

- **Master Data:**
  - Configuring the generic data that will be seen on your products as per your company’s information.

Benefits of Tenant Management System

TMS is an admin panel which allows user management, user role management, com

The benefits of TMS are as follows:

- Creating users, activating and deactivating users as per requirements.
- Creating custom roles for users.
- Creating user groups and assigning role to the user groups.

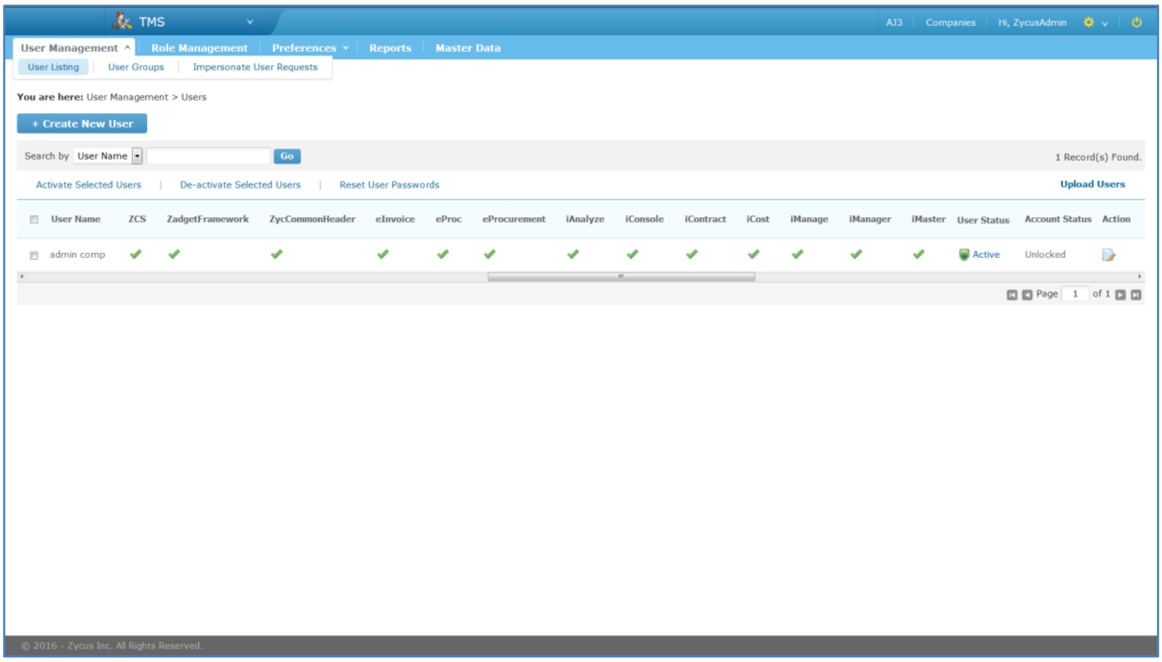
- Customizing the display settings on the products for users.
- Uploading your company related information in organizational units, cost centers, and procurement scope.
- Customizing addresses, regions, location with respect to your company's requirement.

Chapter 2. User Management

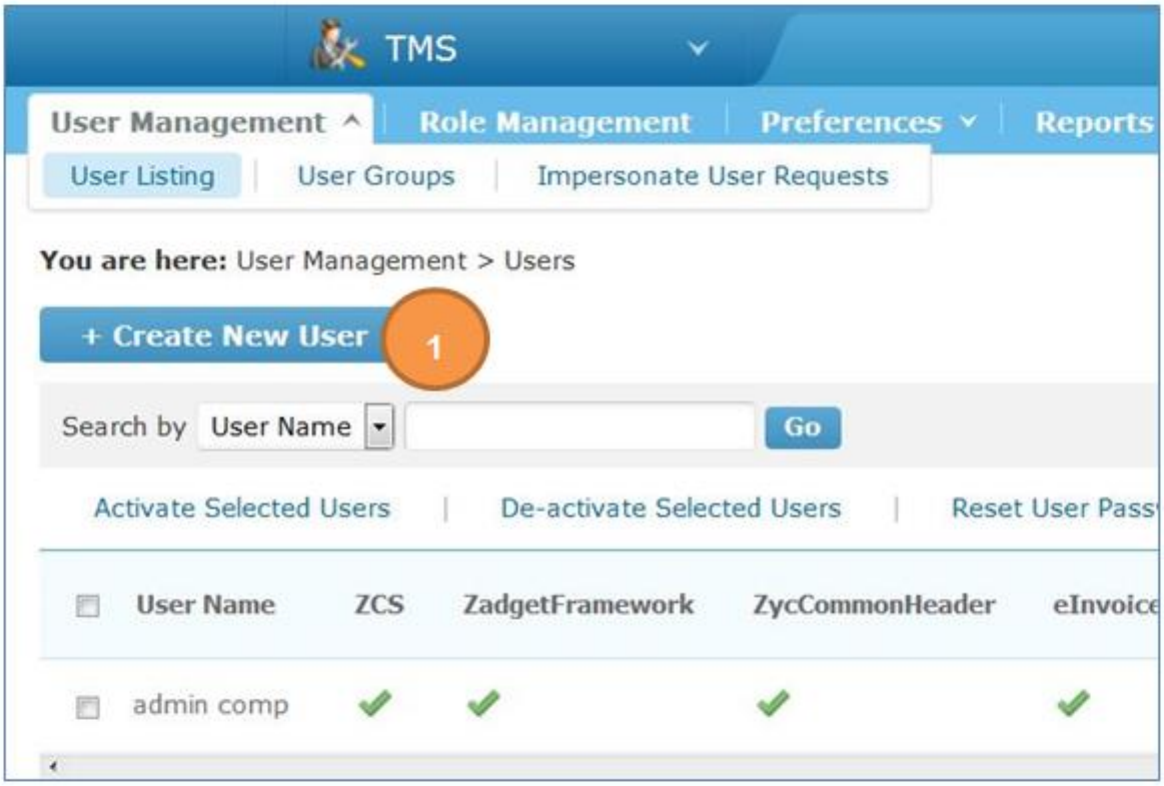
TMS access is provided to those users who have company authorized rights to manage user profiles, user roles, user activities, and general level product settings.

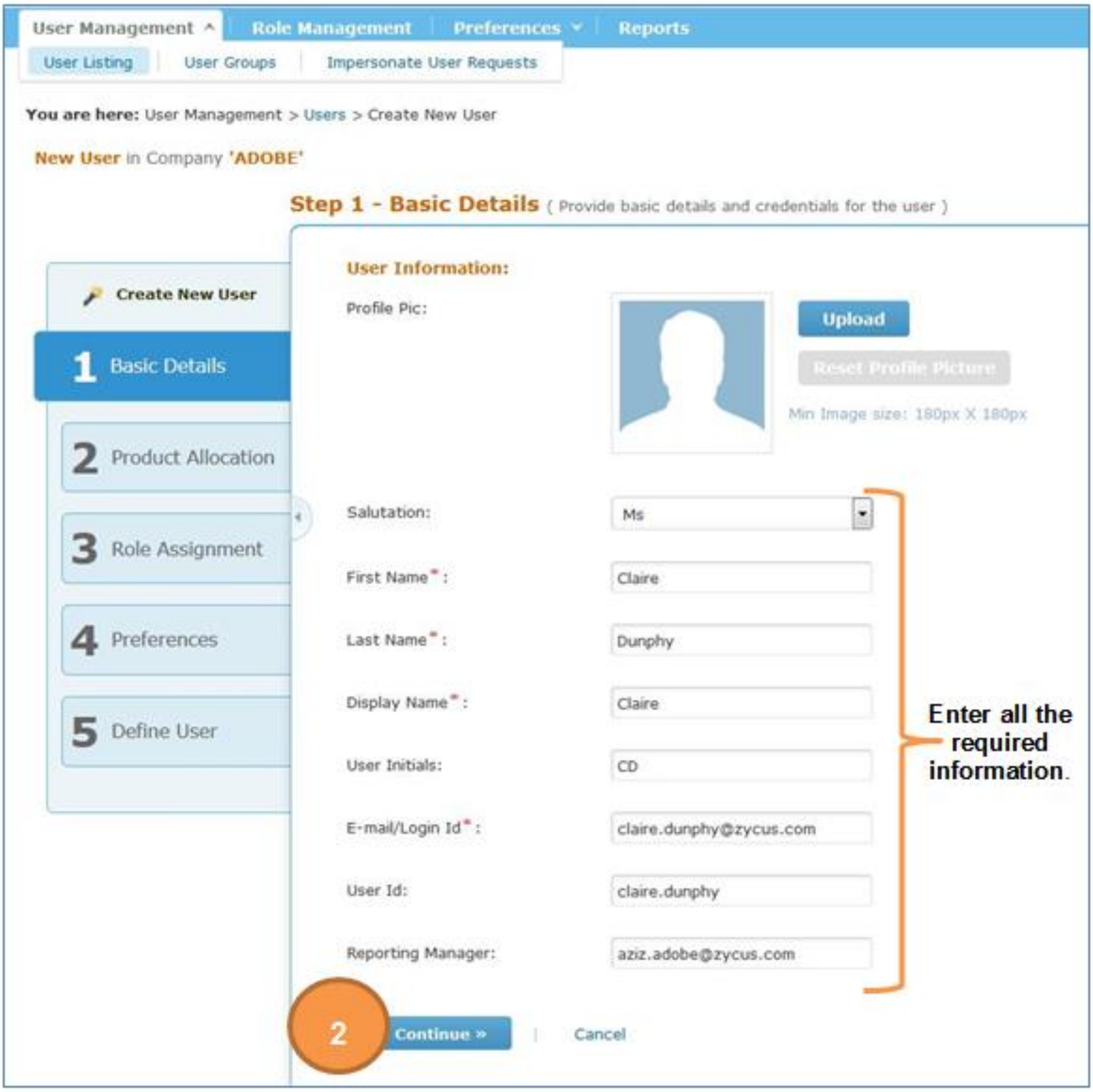
How to Create a New User?

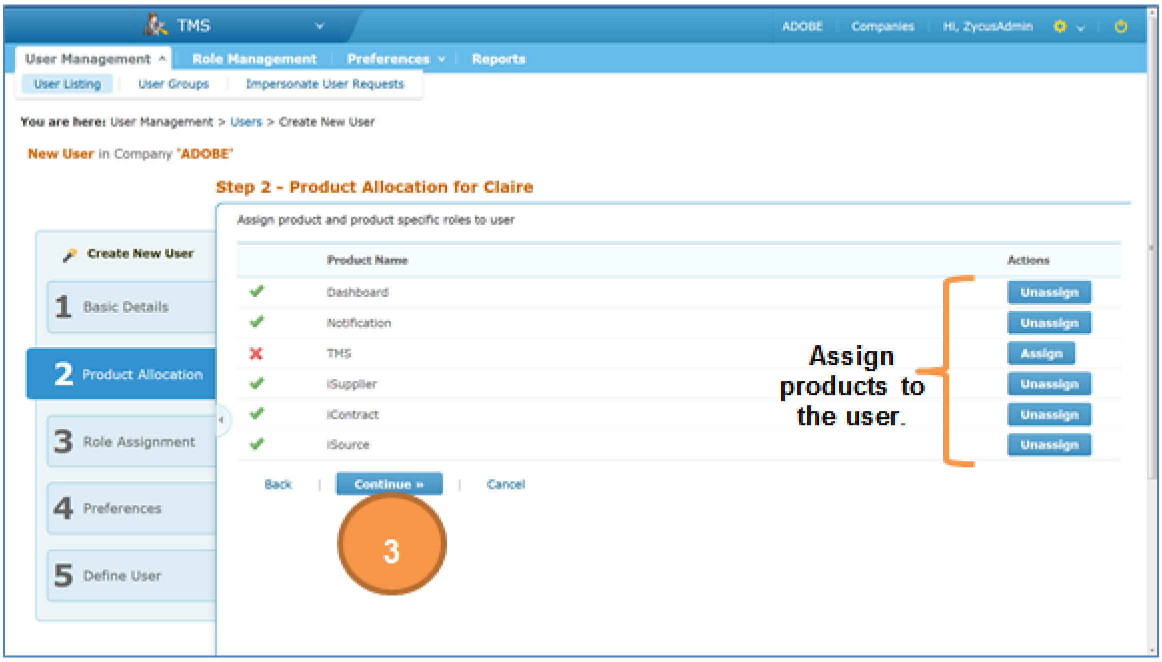
To create a new user, go to **User Management** > **User Listing**. The following page will allow you to create a user.

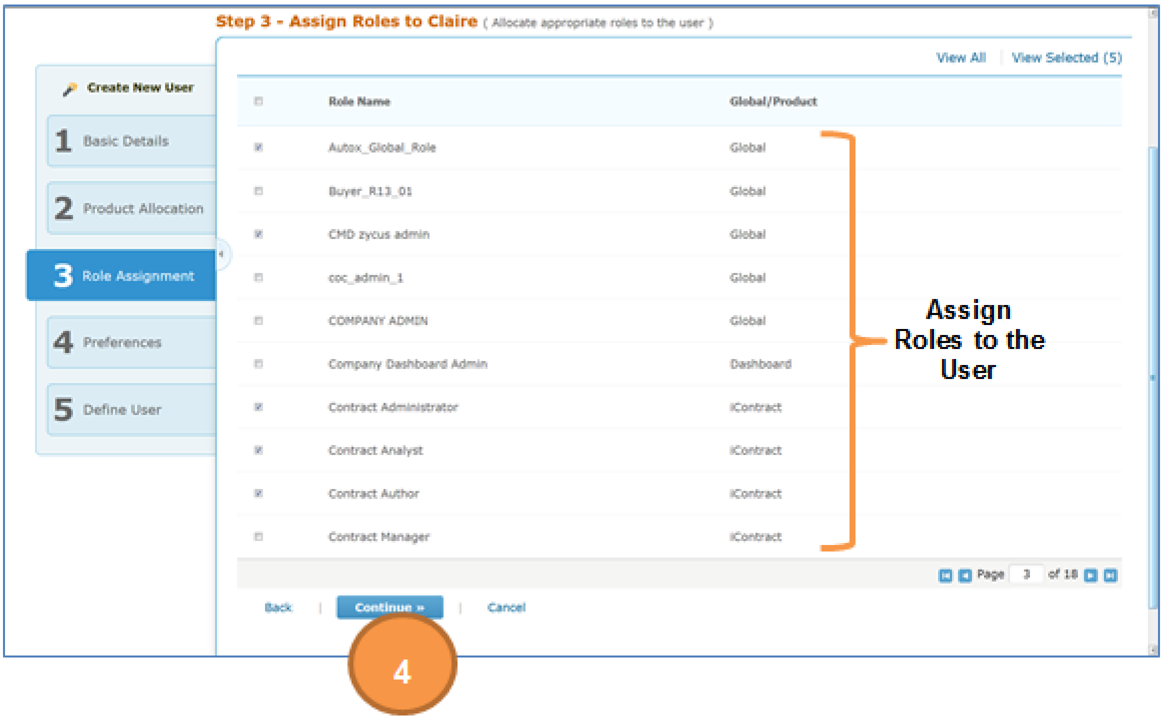


Steps to Create a New User:

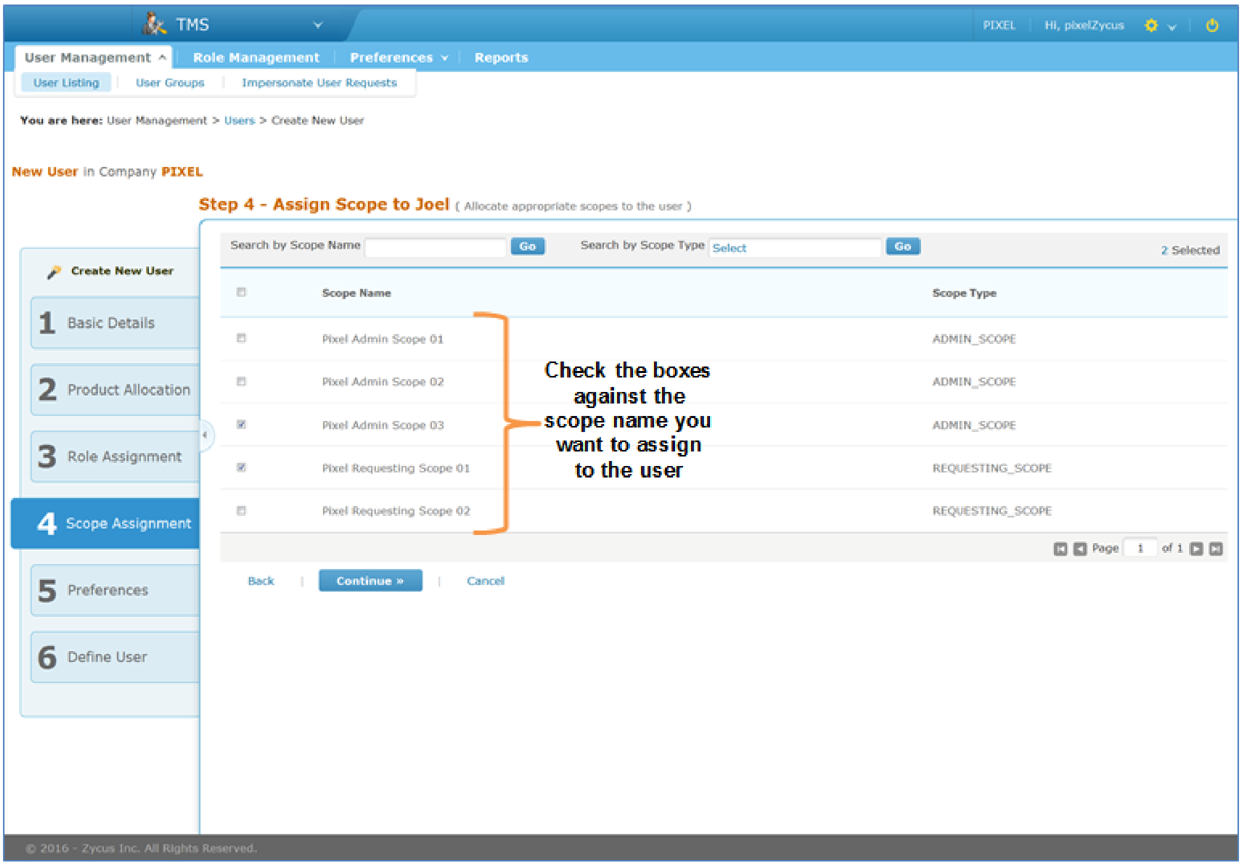



User Management
Role Management
Preferences
Reports
User Listing
User Groups
Impersonate User Requests
You are here: User Management > Users > Create New User
New User in Company 'ADOBE'
Step 1 - Basic Details (Provide basic details and credentials for the user)
Create New User
1 Basic Details
2 Product Allocation
3 Role Assignment
4 Preferences
5 Define User
User Information:
Profile Pic:
Upload
Reset Profile Picture
Min Image size: 180px X 180px
Salutation:
Ms
First Name * :
Claire
Last Name * :
Dunphy
Display Name * :
Claire
User Initials:
CD
E-mail/Login Id * :
claire.dunphy@zycus.com
User Id:
claire.dunphy
Reporting Manager:
aziz.adobe@zycus.com
Enter all the required information.
2
Continue »
Cancel



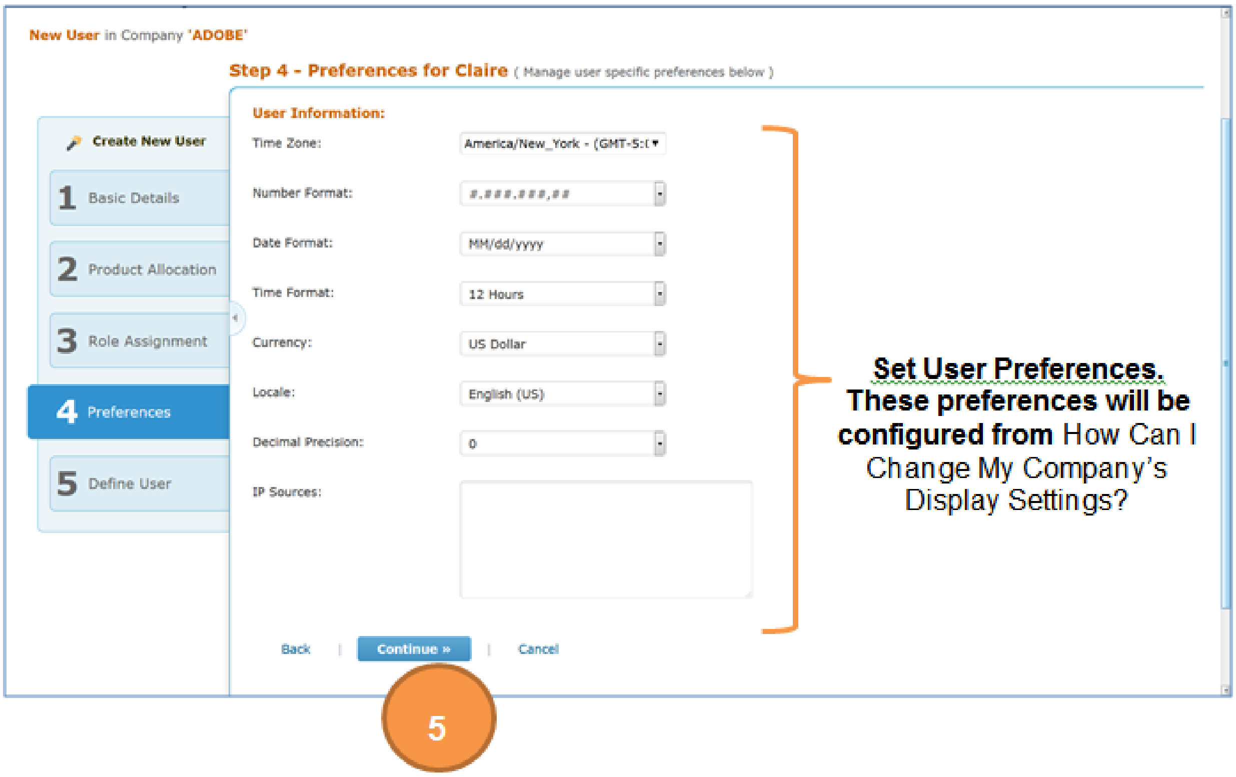


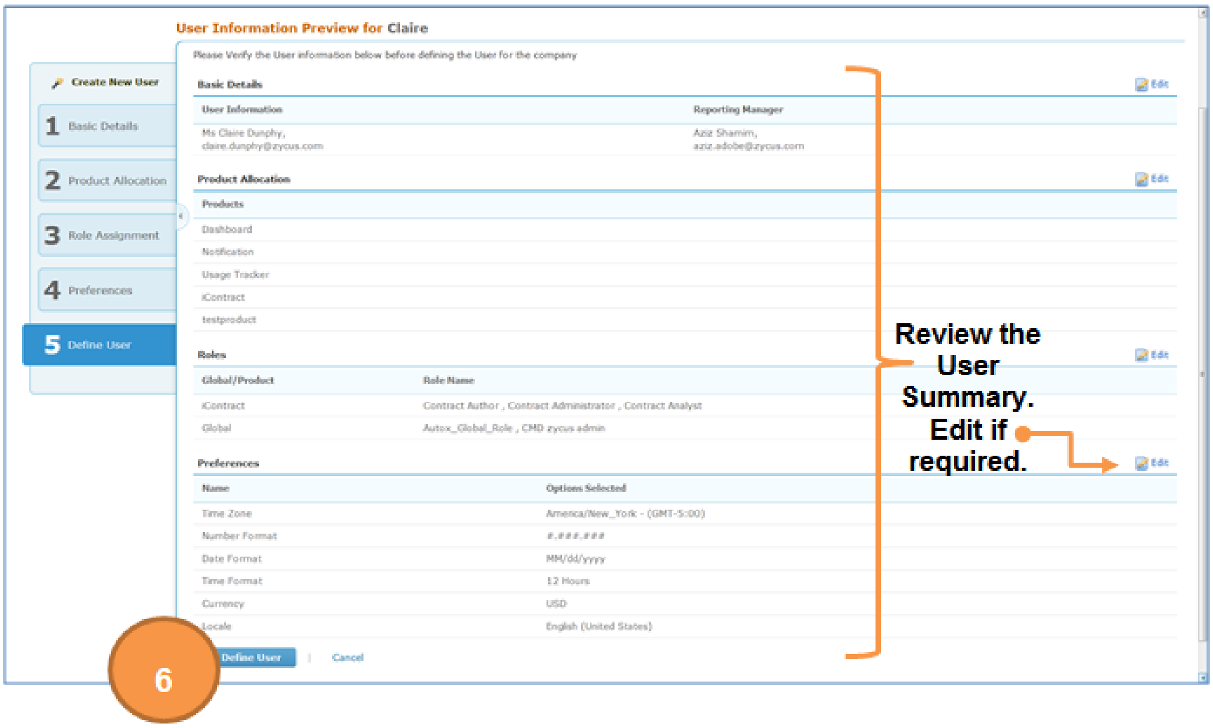
- **If "Scope Selection" is enabled for your company, then you will be able to define a scope for every user you create.**

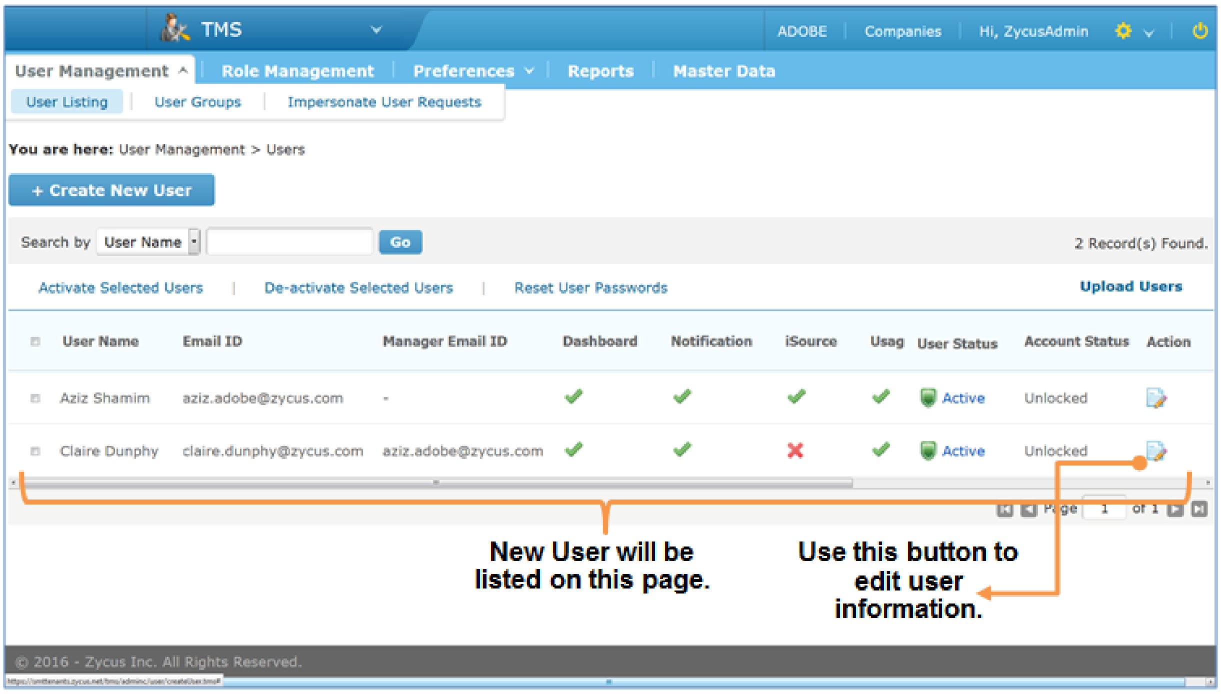


Note: You will be able to view the Step 4: Scope Assignment based on the Zycus Admin settings.

Note: Only Company Admin can assign scope to a user. Local Admin will not have rights to perform this action.

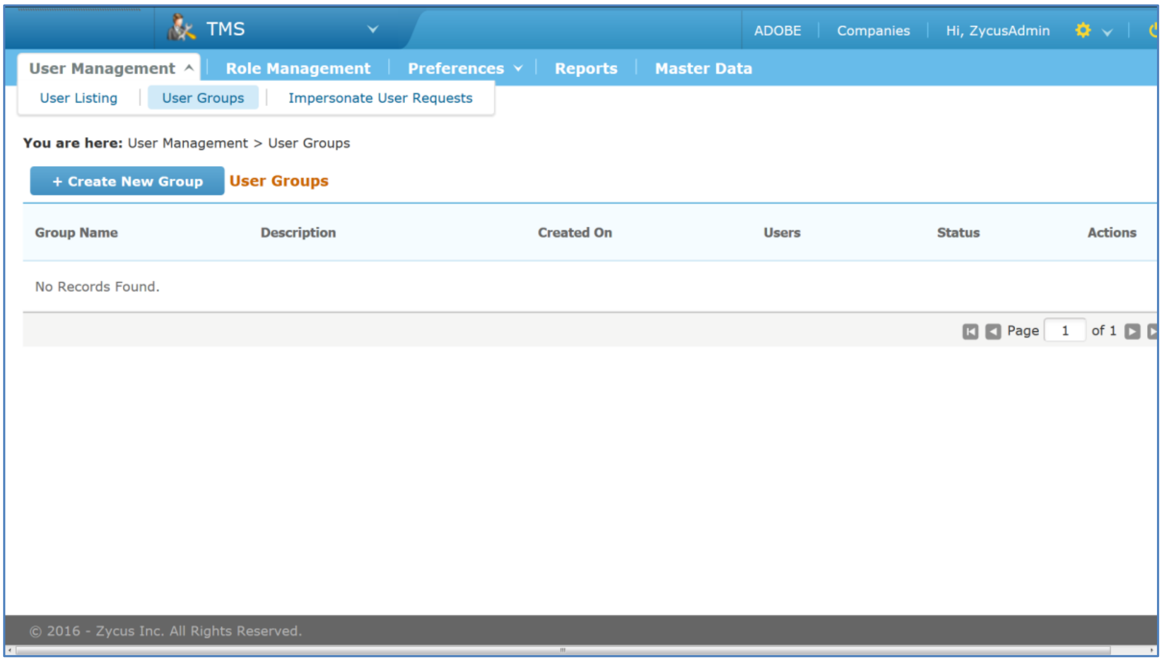

New User in Company 'ADOBE'
Step 4 - Preferences for Claire (Manage user specific preferences below)
Create New User
1 Basic Details
2 Product Allocation
3 Role Assignment
4 Preferences
5 Define User
User Information:
Time Zone: America/New_York - (GMT-5:0
Number Format: #,###,###,##
Date Format: MM/dd/yyyy
Time Format: 12 Hours
Currency: US Dollar
Locale: English (US)
Decimal Precision: 0
IP Sources:
Back | Continue » | Cancel
5
Set User Preferences.
These preferences will be configured from How Can I Change My Company's Display Settings?


User Information Preview for Claire
Please Verify the User information below before defining the User for the company
Create New User
1 Basic Details
2 Product Allocation
3 Role Assignment
4 Preferences
5 Define User
Basic Details
User Information
Reporting Manager
Ms Claire Dunphy,
claire.dunphy@zycus.com
Aziz Shamim,
aziz.adobe@zycus.com
Product Allocation
Products
Dashboard
Notification
Usage Tracker
iContract
testproduct
Roles
Global/Product
Role Name
iContract
Contract Author , Contract Administrator , Contract Analyst
Global
Autox_Global_Role , CMD zycus admin
Preferences
Name
Options Selected
Time Zone
America/New_York - (GMT-5:00)
Number Format
#,###,###
Date Format
MM/dd/yyyy
Time Format
12 Hours
Currency
USD
Locale
English (United States)
Edit
Define User | Cancel
6
Review the User Summary. Edit if required.

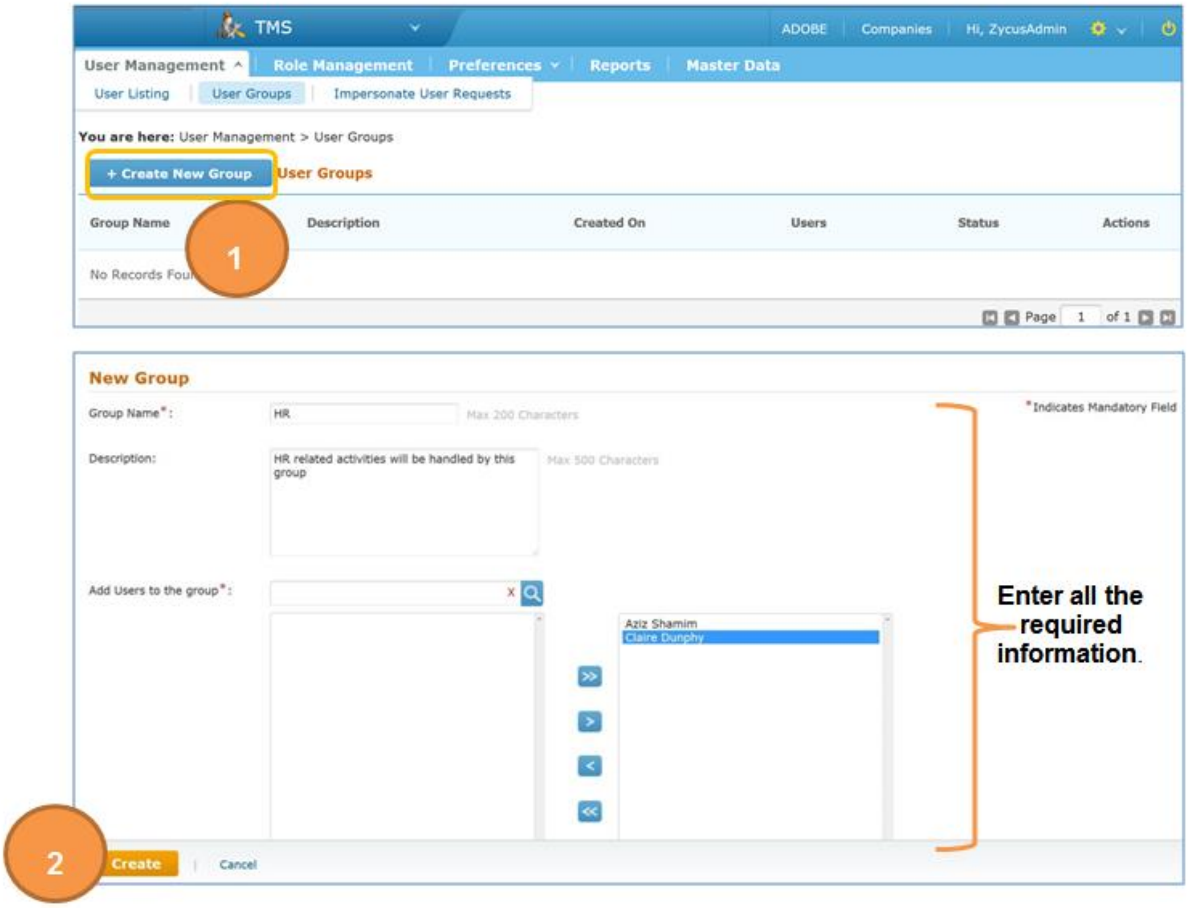


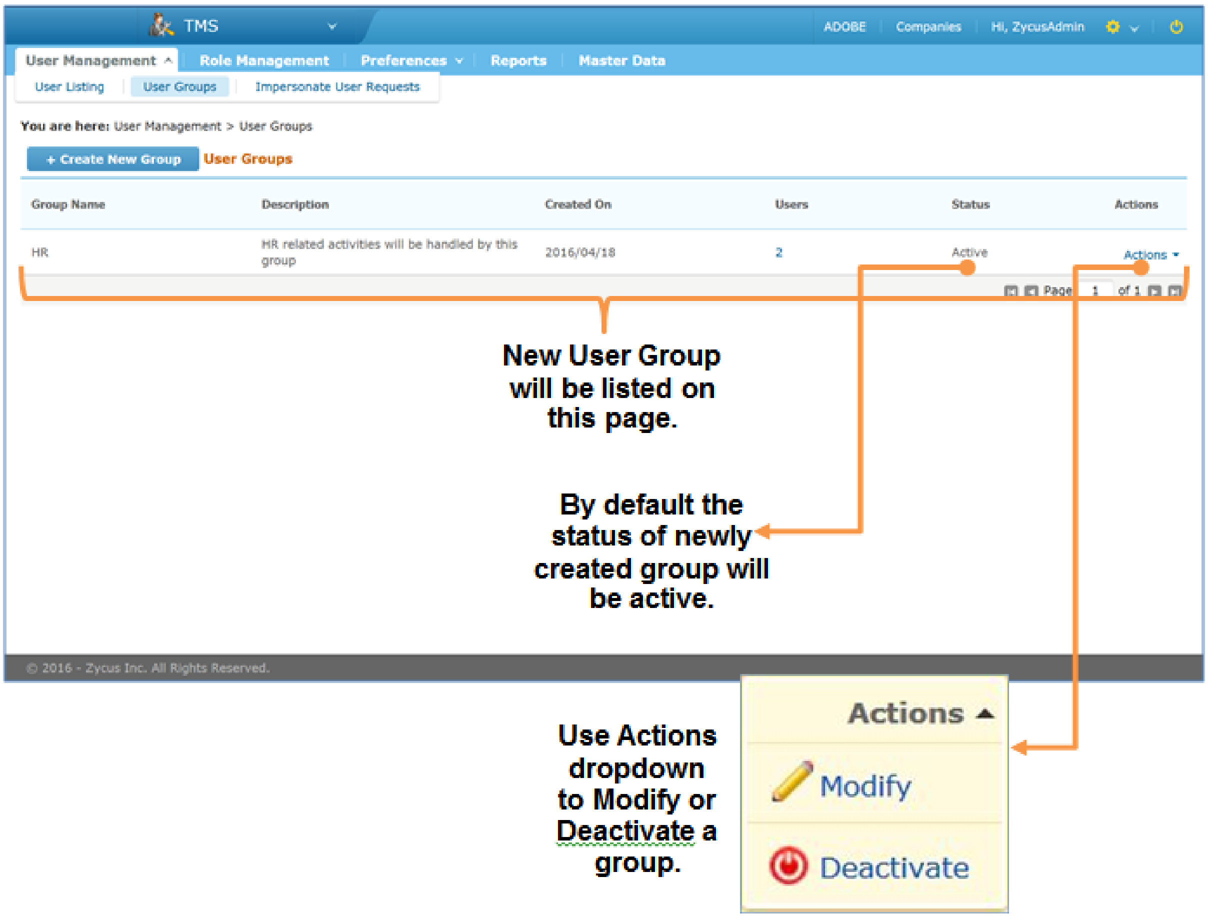
How to Create a User Group?

- Go to User Groups under User Management. You will be able to see the following page. Any existing groups will be listed on this page.
- A user group can be created when multiple users have same activities to perform.

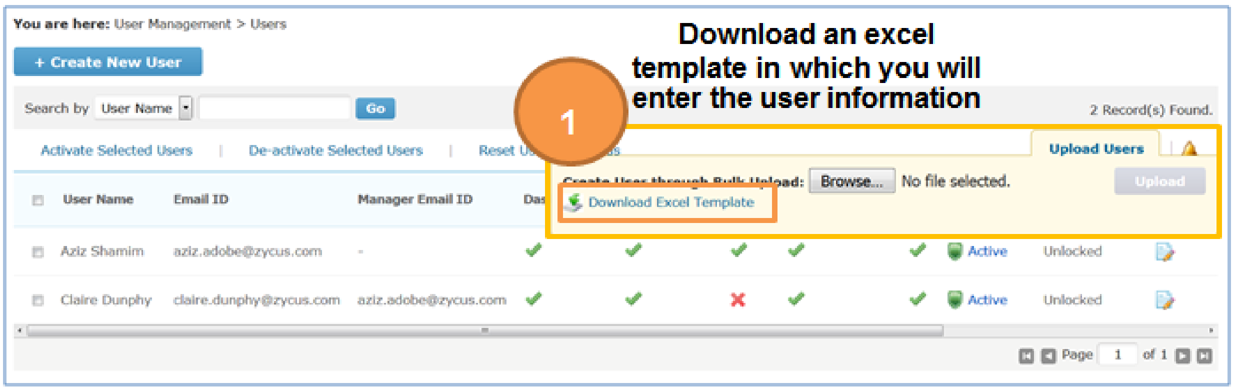


Steps to create a new group:



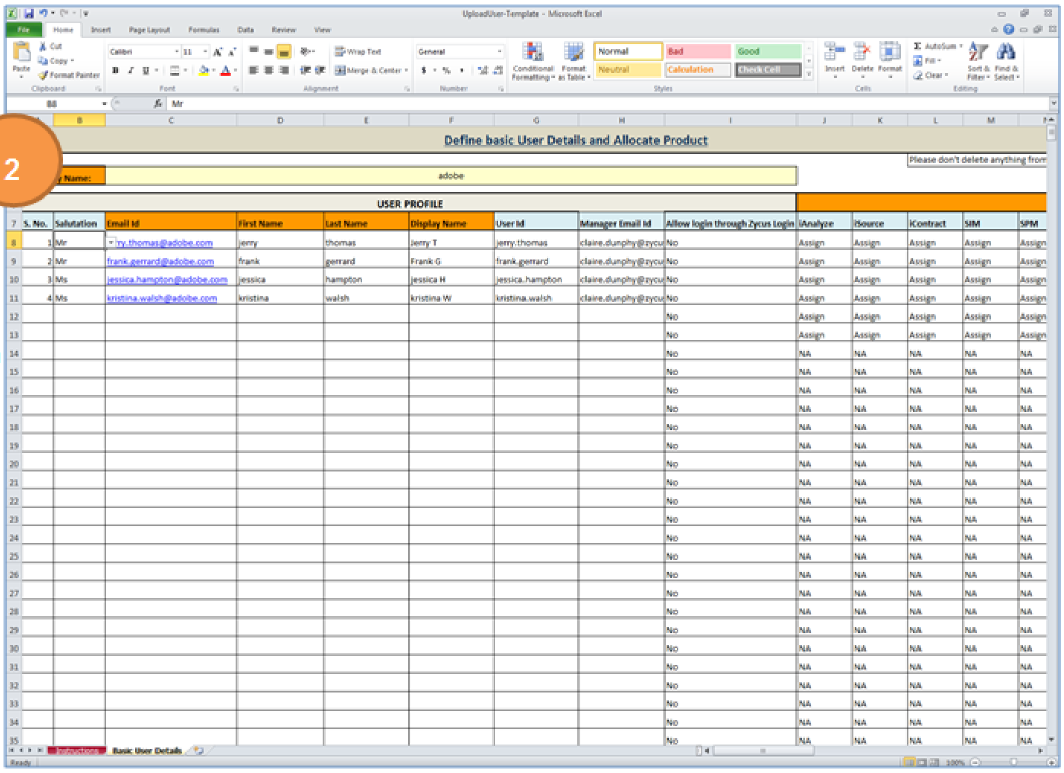


How to Bulk Upload Users?

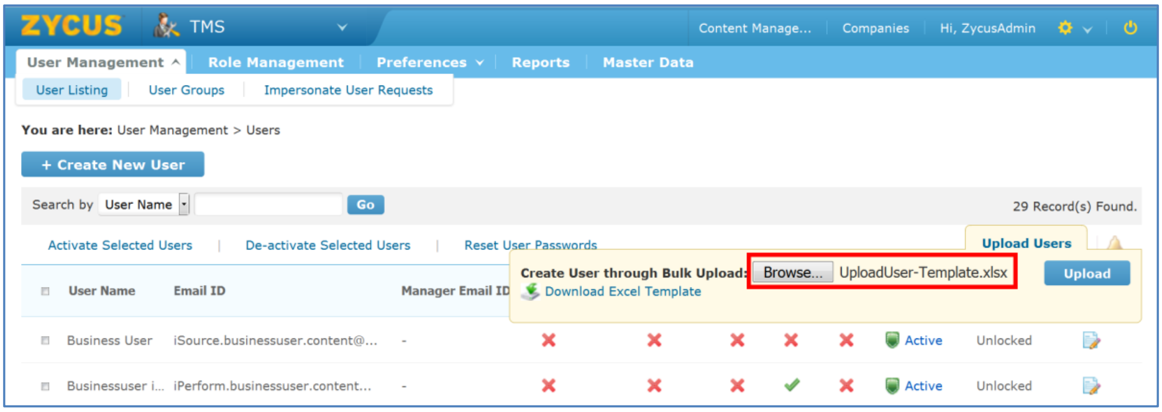


2

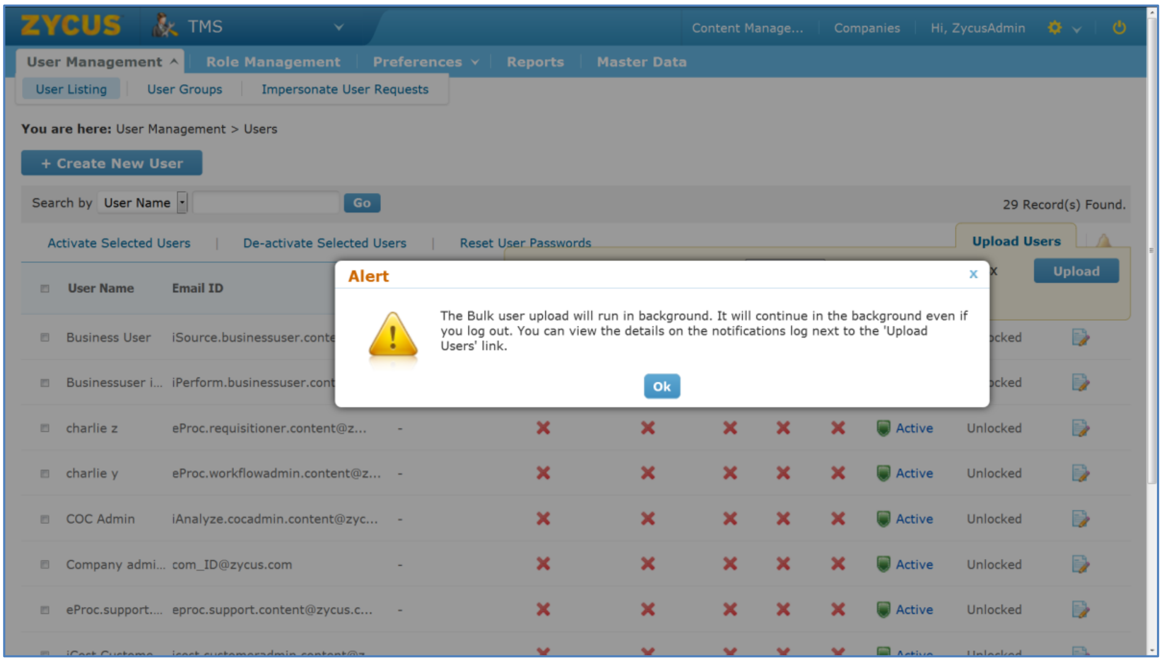
Enter the user information as prompted in the excel file and save the file



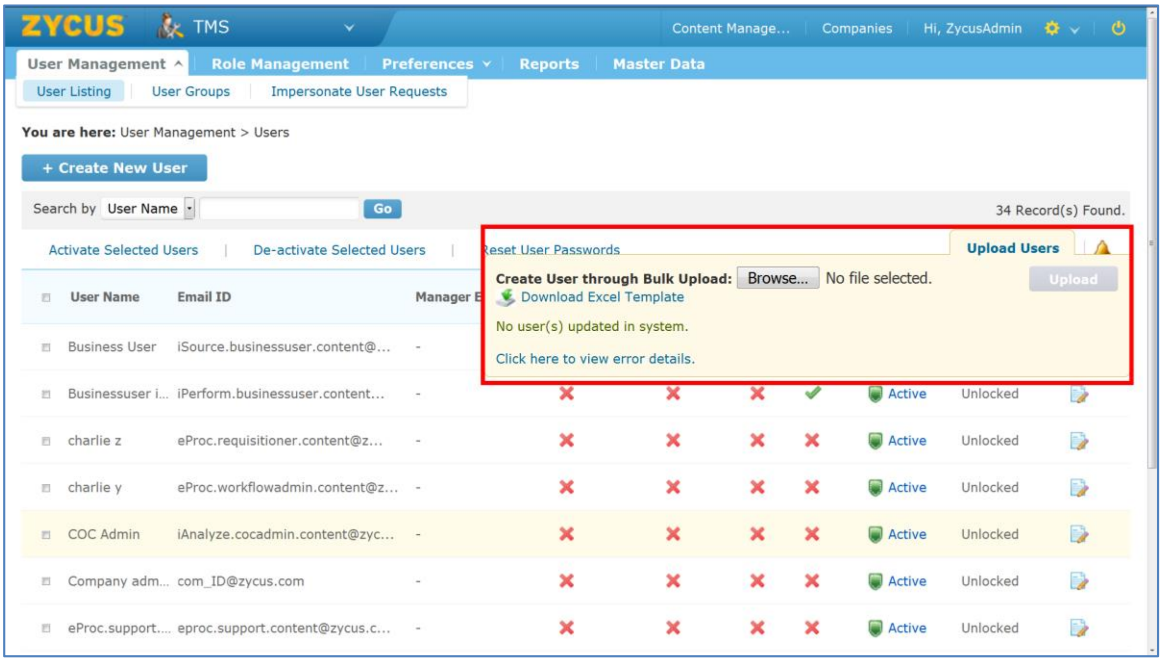
- **Upload the file back to the tool**



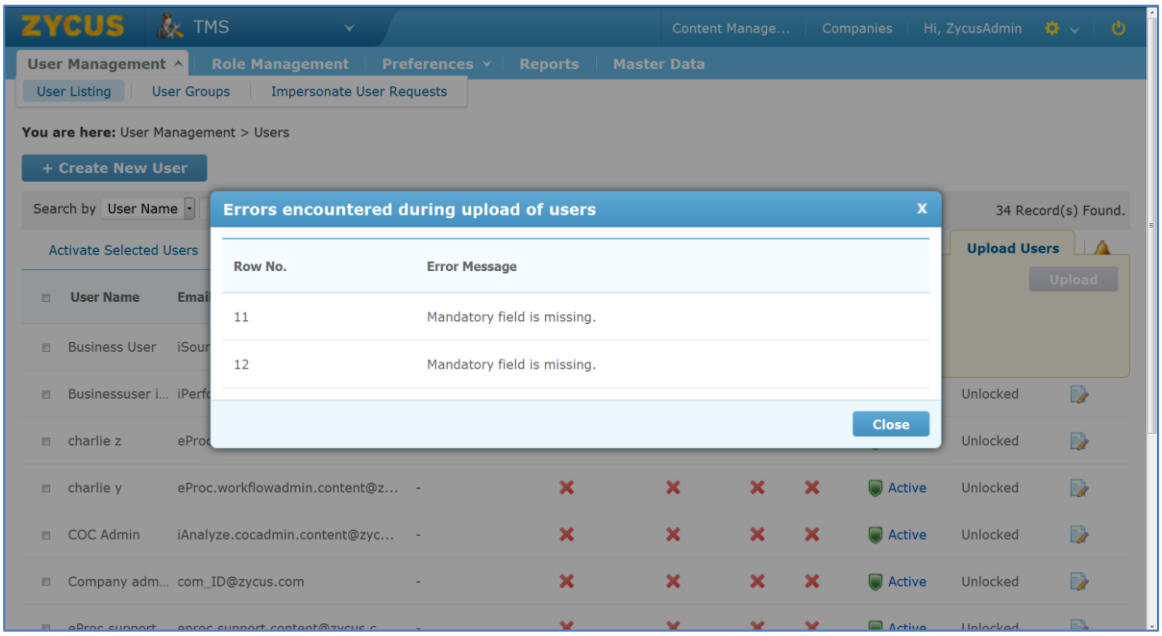
- **Click Upload. The upload process will run in the background.**



- **In case of any errors, you will be notified in the popup.**

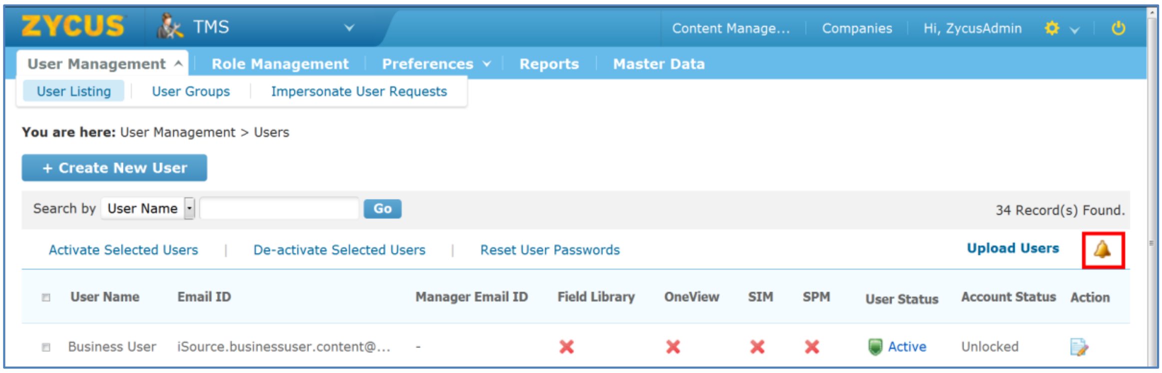


- Go to the link "Click here to view error details." Following popup will be displayed:

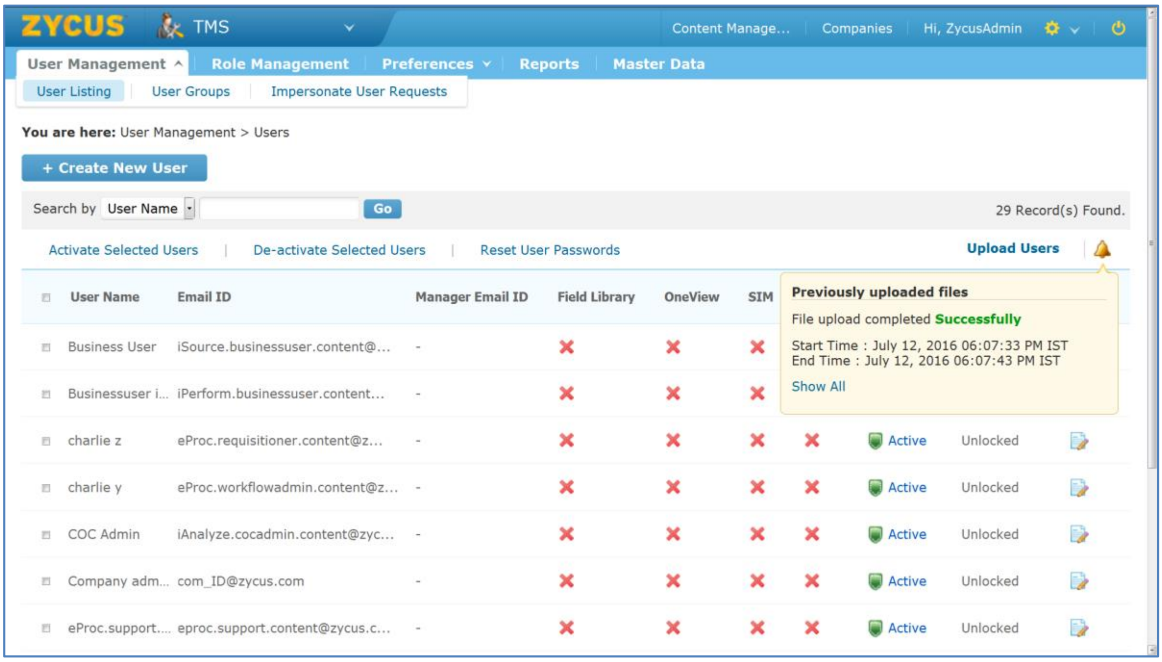


- Address the errors and re-upload the file.

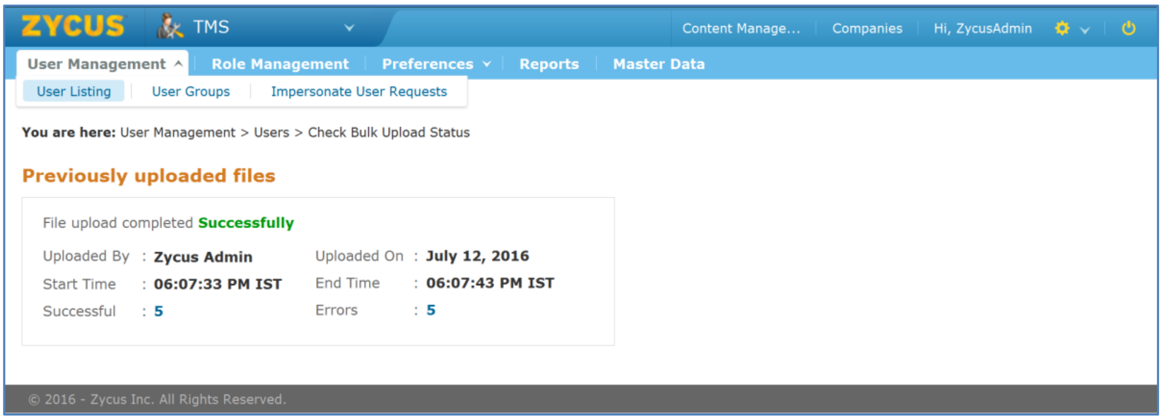
- Once the bulk upload is complete, you will be notified as highlighted below:



- **Click on the Bell icon to view the notifications. You will view a message on the status of “Previously Uploaded Files”.**



- **Click Show All to view all the previously uploaded files.**



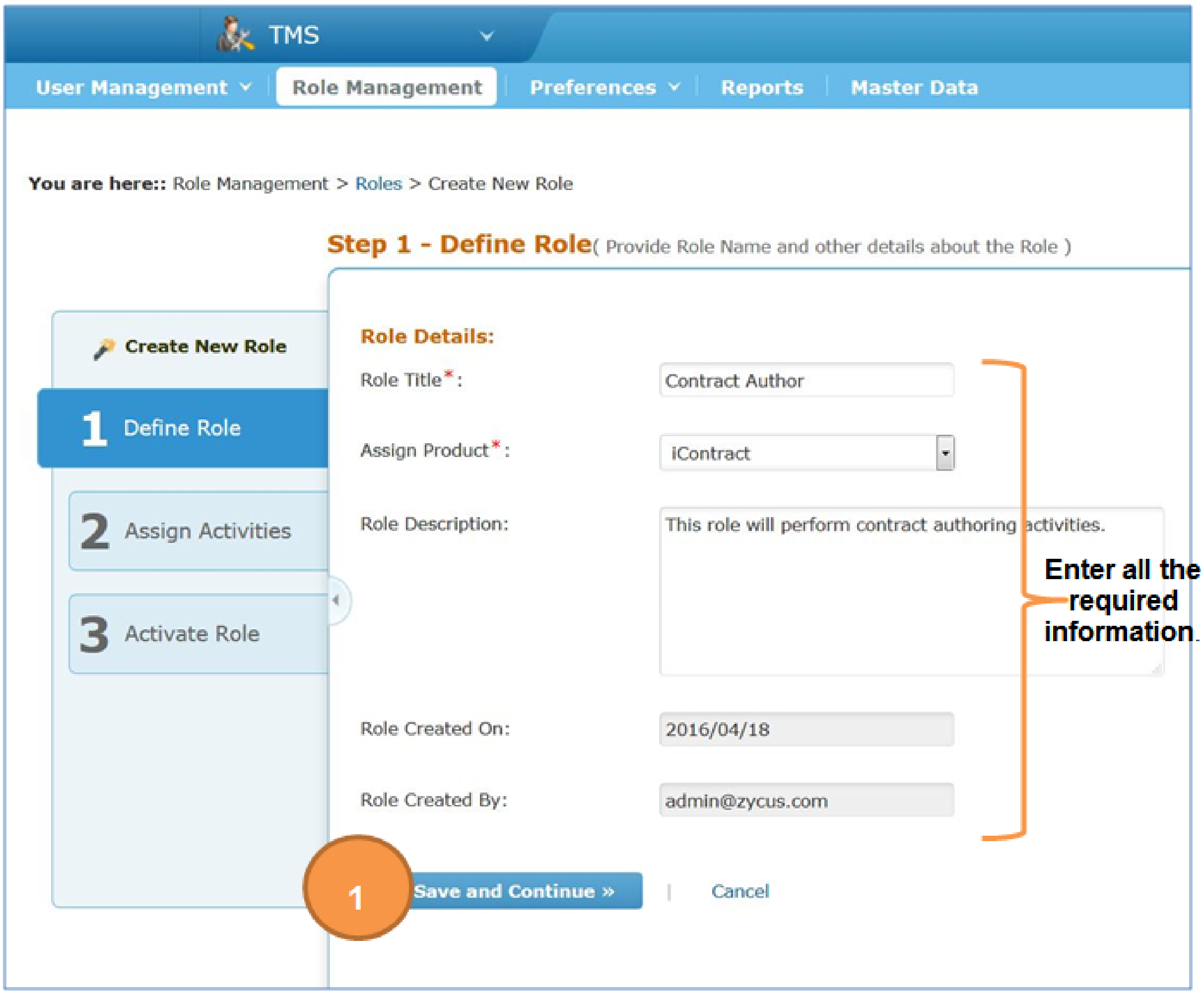
Note: You will be able to view last five uploaded files.

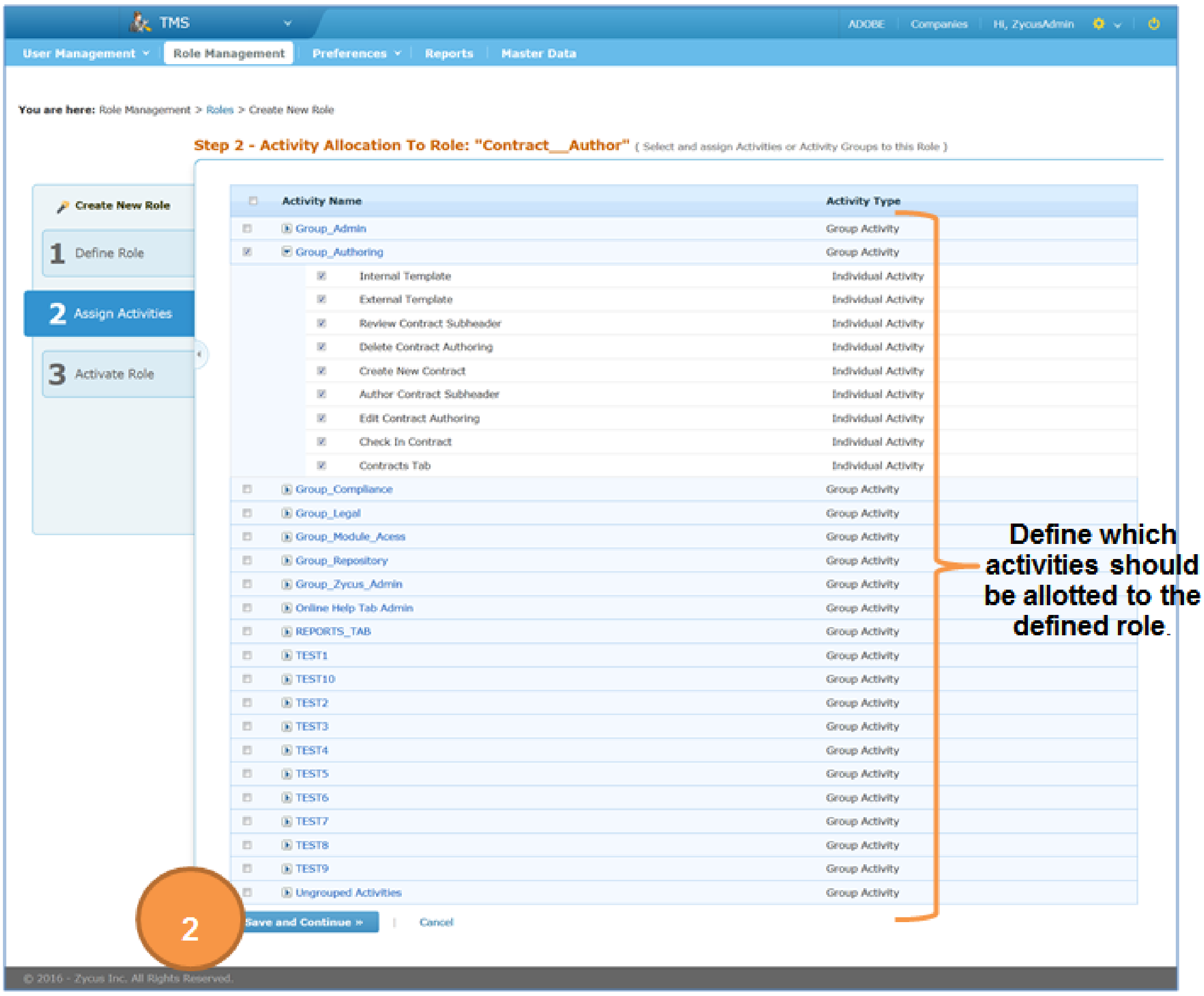
Chapter 3. Role Management

TMS admin can create roles for each product. Role consists of various product related activities. Product related activities will be created and made available to you by Zycus. You can create roles for a particular product by selecting from the range of activities provided.

How to Create a New Role?

- Define a role with role title
- Select a product to which the role applies
- Provide a role description
- Assign activities from Zycus provided list of activities
- Activate the role so it can be assigned to a user




TMS
ADOBE
Companies
Hi, ZycusAdmin
User Management
Role Management
Preferences
Reports
Master Data
You are here: Role Management > Roles > Create New Role
Step 2 - Activity Allocation To Role: "Contract__Author" (Select and assign Activities or Activity Groups to this Role)
Create New Role
1 Define Role
2 Assign Activities
3 Activate Role
Activity Name
Activity Type
Group_Admin
Group Activity
Group_Authoring
Group Activity
Internal Template
Individual Activity
External Template
Individual Activity
Review Contract Subheader
Individual Activity
Delete Contract Authoring
Individual Activity
Create New Contract
Individual Activity
Author Contract Subheader
Individual Activity
Edit Contract Authoring
Individual Activity
Check In Contract
Individual Activity
Contracts Tab
Individual Activity
Group_Compliance
Group Activity
Group_Legal
Group Activity
Group_Module_Acess
Group Activity
Group_Repository
Group Activity
Group_Zycus_Admin
Group Activity
Online Help Tab Admin
Group Activity
REPORTS_TAB
Group Activity
TEST1
Group Activity
TEST10
Group Activity
TEST2
Group Activity
TEST3
Group Activity
TEST4
Group Activity
TEST5
Group Activity
TEST6
Group Activity
TEST7
Group Activity
TEST8
Group Activity
TEST9
Group Activity
Ungrouped Activities
Group Activity
Define which activities should be allotted to the defined role.
2
Save and Continue »
Cancel
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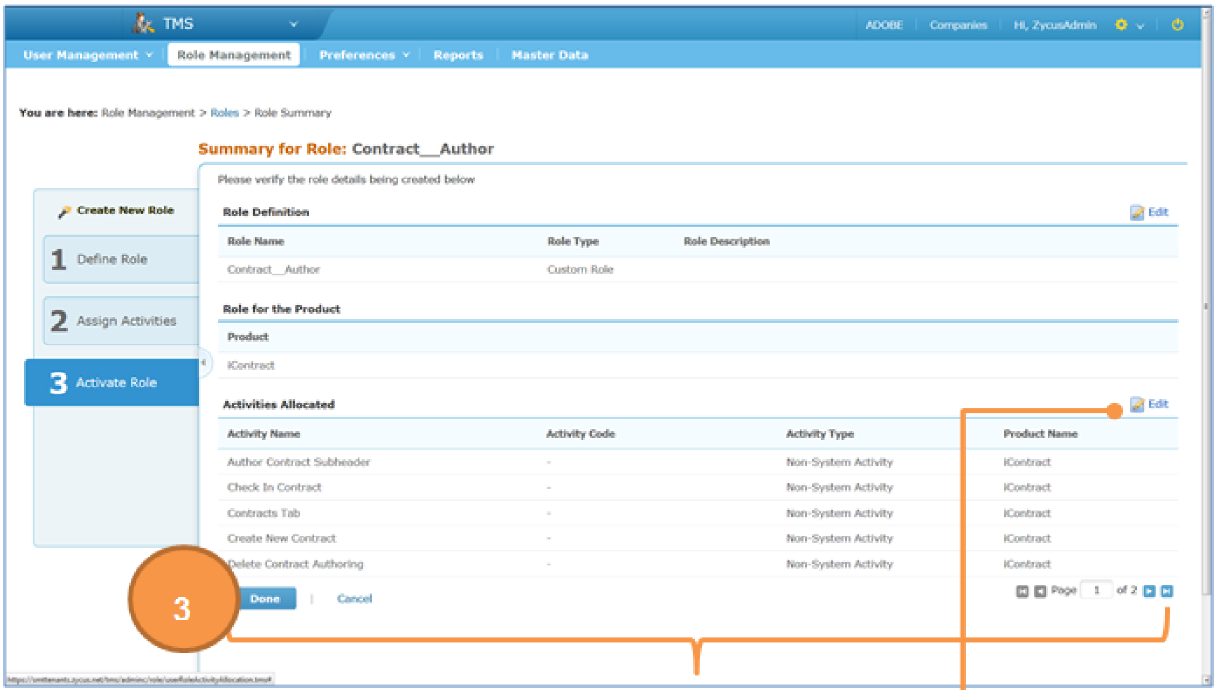
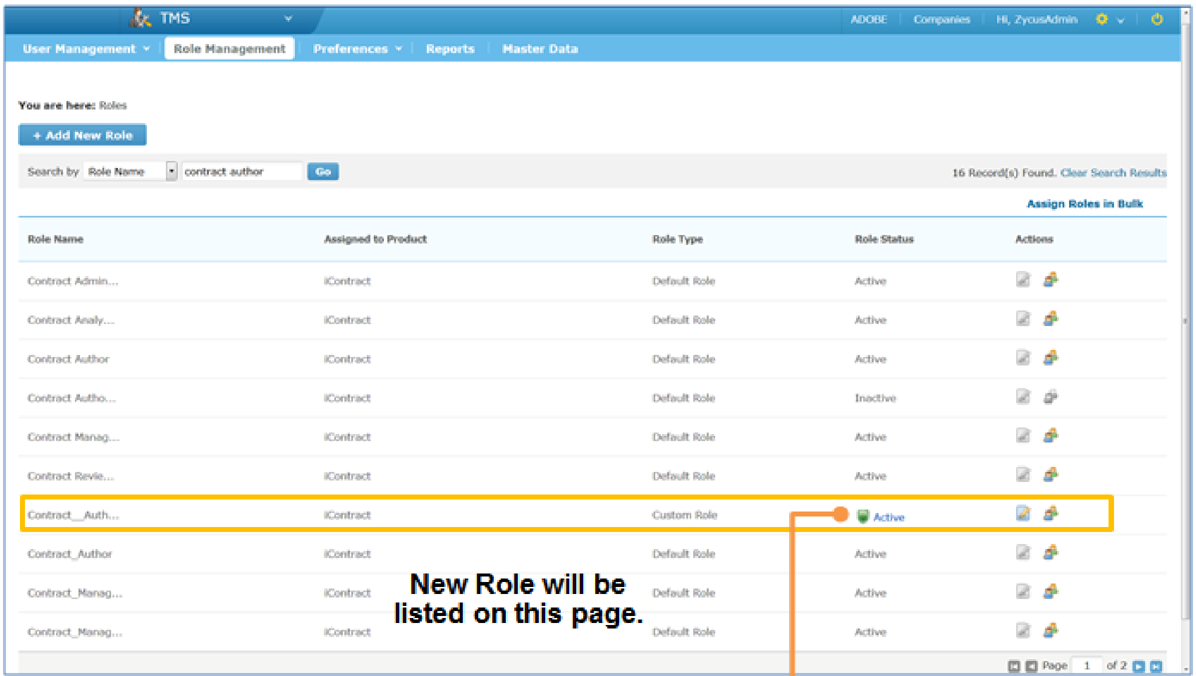
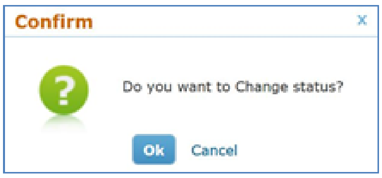


Review the Role Summary.

Edit if required.



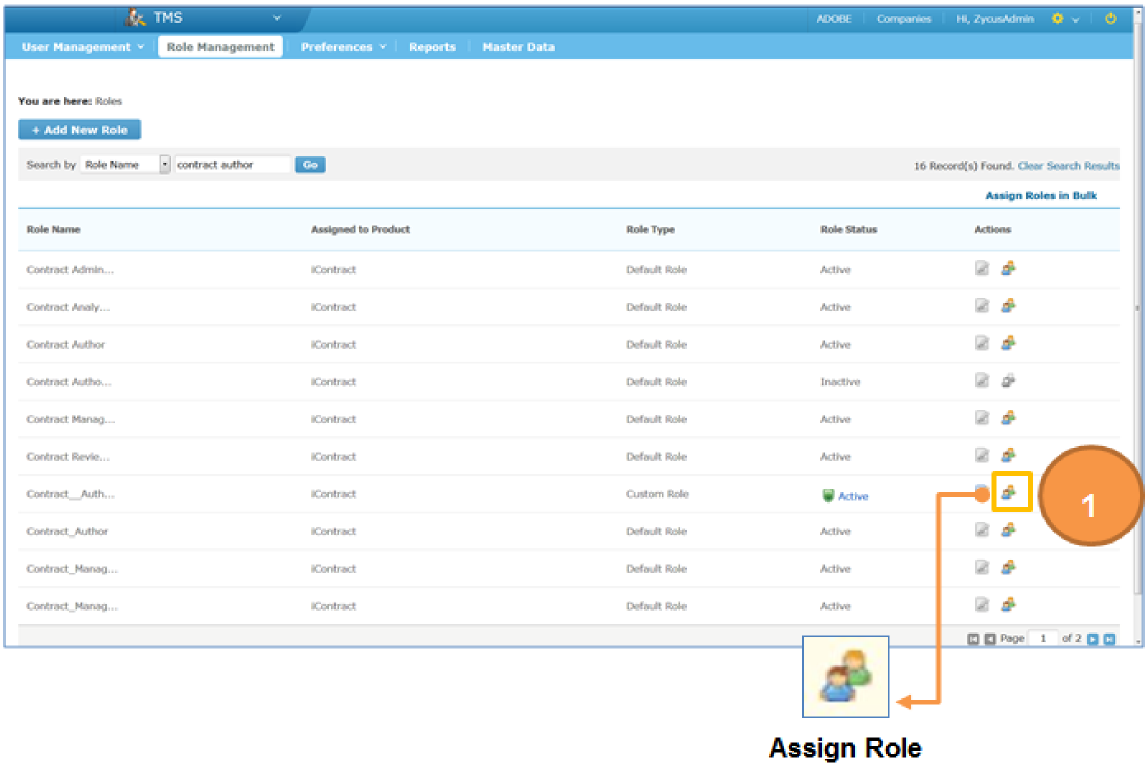


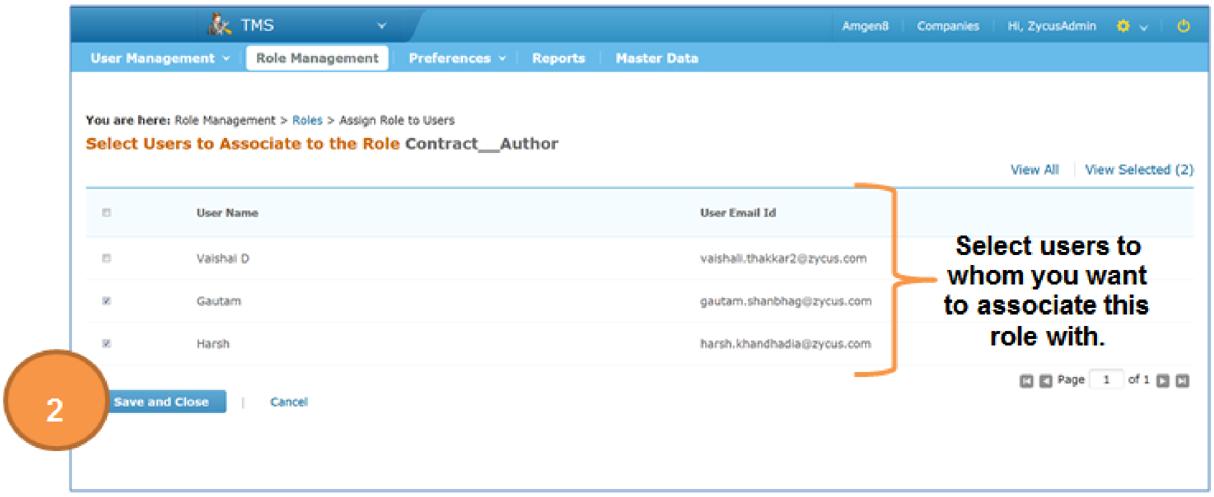
Click on the status Active to change it.

How to Assign Users a Role?

After you complete defining roles for each product, you can assign them to your users.

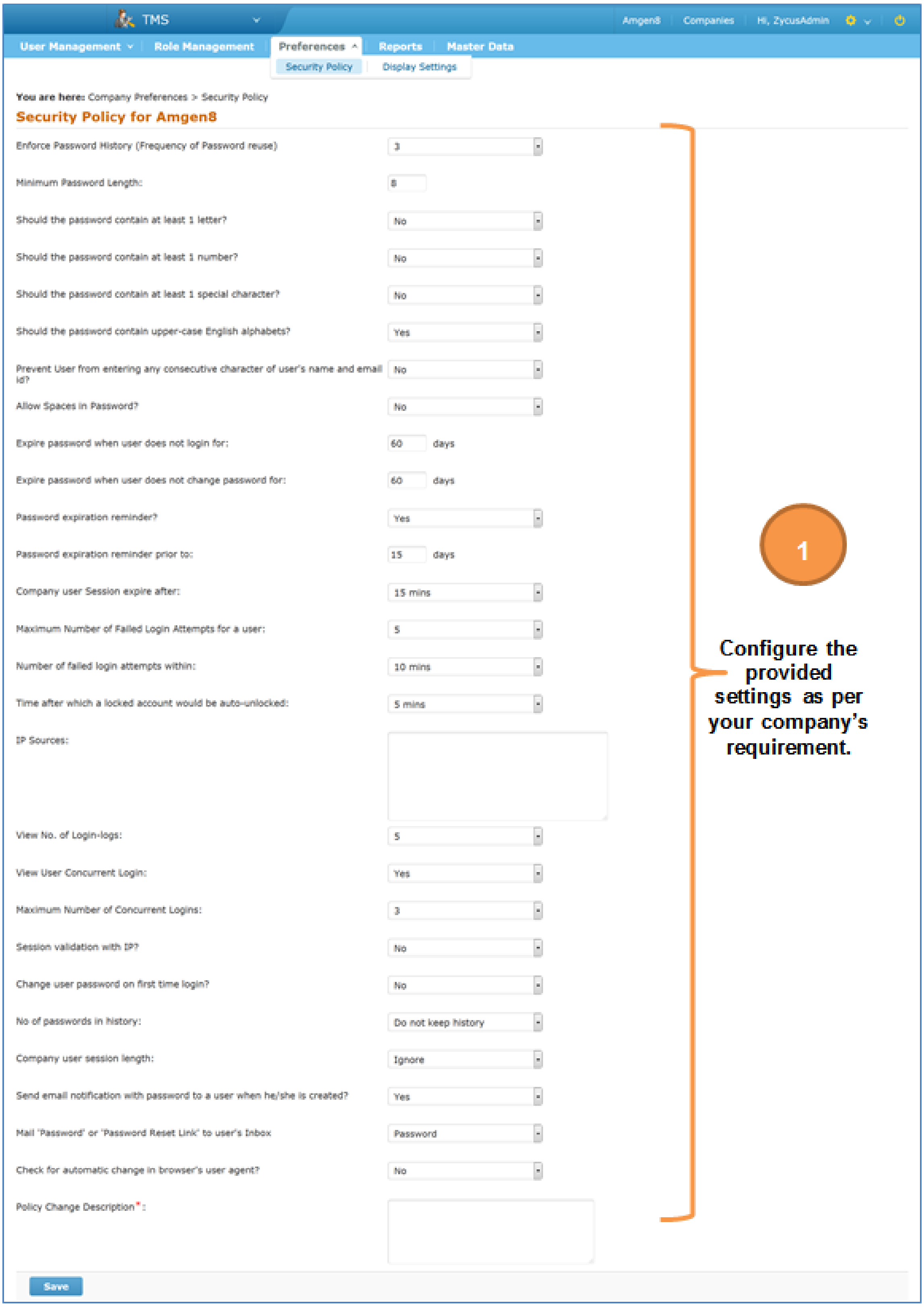
Steps to assign roles to users:





Chapter 4. Company Preferences

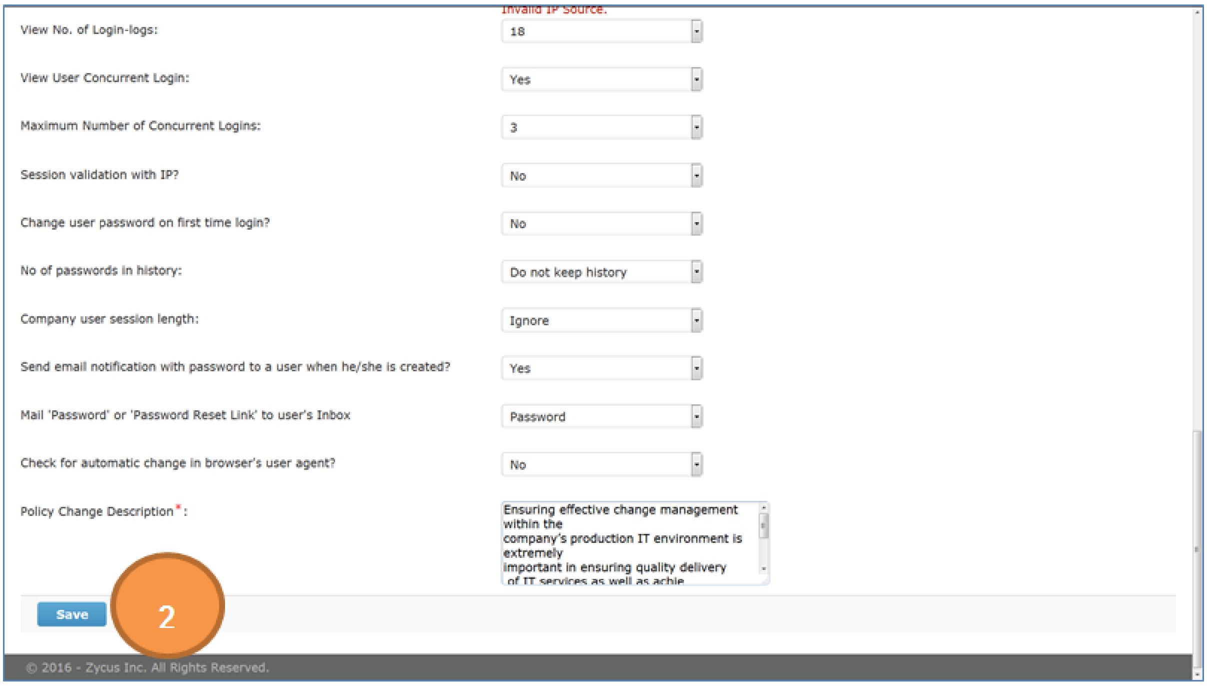
How to Configure My Company's Security Setting?



Sr. No.	Security Policy	Description / Data Type
1	Enforce Password History (Frequency of Password reuse)	This setting defines a number of past passwords your user cannot use to reset the password
2	Minimum Password Length	Enter the minimum password length your users have to enter.
3	Should the password contain at least 1 letter?	Select Yes if you want your users password to contain at least 1 letter, or else select No
4	Should the password contain at least 1 number?	Select Yes if you want your users password to contain at least 1 number, or else select No
5	Should the password contain at least 1 special character?	Select Yes if you want your users password to contain at least 1 special character, or else select No
6	Should the password contain upper-case English alphabets?	Select Yes if you want your users password to contain upper case English alphabet, or else select No
7	Prevent User from entering any consecutive character of user's name and email id?	Enable this to prevent your users from using their email id or name as a password
8	Allow Spaces in Password?	Select Yes if you want your users password to contain spaces, or else select No
9	Expire password when user does not login for	Enter the number of days in which the user's password should expire if the user does not logs in
10	Expire password when user does not change password for	Enter the number of days after which user will have to change password
11	Password expiration reminder?	Select Yes if you want to send a password expiration reminder to your users, or else select No
12	Password expiration reminder prior to	Enter the number of days before password expiration when user will be reminded to change the password
13	Company user Session expire after	It is the session duration of the user's last click to defined duration.
14	Maximum Number of Failed Login Attempts for a user	Select a value from dropdown
15	Number of failed login attempts within	Enter the time between consecutive failed login attempts
16	Time after which a locked account would be auto-unlocked	Select in how much time you want the locked account to be able to unlock

17	IP Sources	Define IP addresses from which the users will be able to access products
18	View No. of Login-logs	Select the number of logins of a user you want to log and display
19	View User Concurrent Login	Enable to view if the user has concurrently logged in from other instance
20	Maximum Number of Concurrent Logins	Select how many concurrent logins you want to allow your users
21	Session validation with IP?	This setting allows validating the session ID with authorized IP
22	Change user password on first time login?	Select Yes if you want your user to change the password on their first login, or else select No
23	No of passwords in history	Enter the number of passwords which can be saved in the history
24	Company user session length	Select a session duration for the users of your company, after which the user will be forcefully logged out
25	Send email notification with password to a user when he/she is created?	Select Yes if you want to send an email notification to your user with the password the user has created, or else select No
26	Mail 'Password' or 'Password Reset Link' to user's Inbox	Choose if you want to send user's **password** or **password reset link** to your user's inbox
27	Check for automatic change in browser's user agent?	Select Yes if you want to display security alert page to the user when users browser agent gets changed automatically or manually during users session, else select No
28	Policy Change Description*	Enter the description of your policy change which will be visible to your users

***Note:* "Ignore this check" option in the dropdown will avoid checking that condition on the product.**



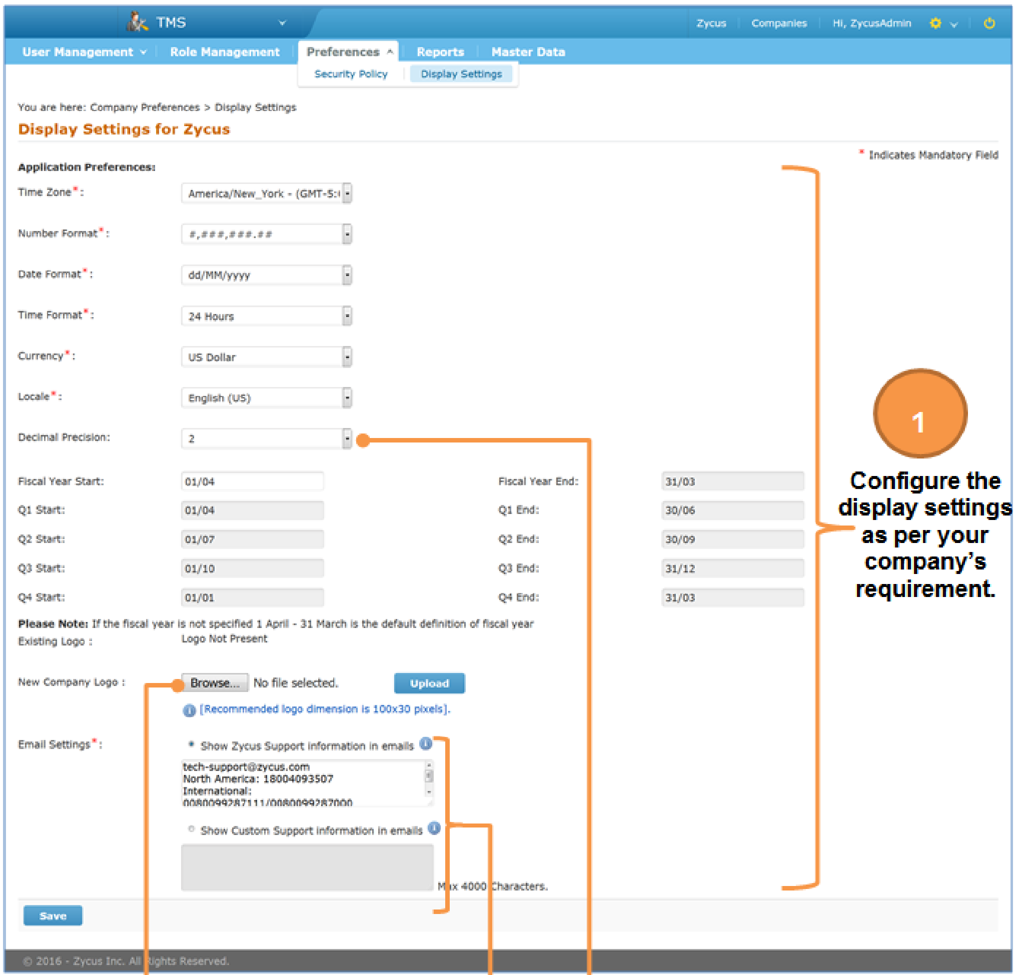
<u>Note:</u> User preferences are defaulted as per the tenant settings.

How Can I Change My Company's Display Settings?

This section answers the following questions:

How Can I Change My Company's Time Zone?
How to Change the Number Format Of All the Numbers I See on the Products?
How to Change the Date Format on My Products?
How Can I Apply My Company's Default Currency to all the data on Products?
How Can I to Change the Language on all the Products?
How to Configure The Decimal Precision Of The Numbers I See On The Products?
How to Set the Fiscal Year Start and Fiscal Year End?
How to Change/Update My Company's Logo?
How to Configure My Company's Support Email ID?

The following image will answer the above questions:



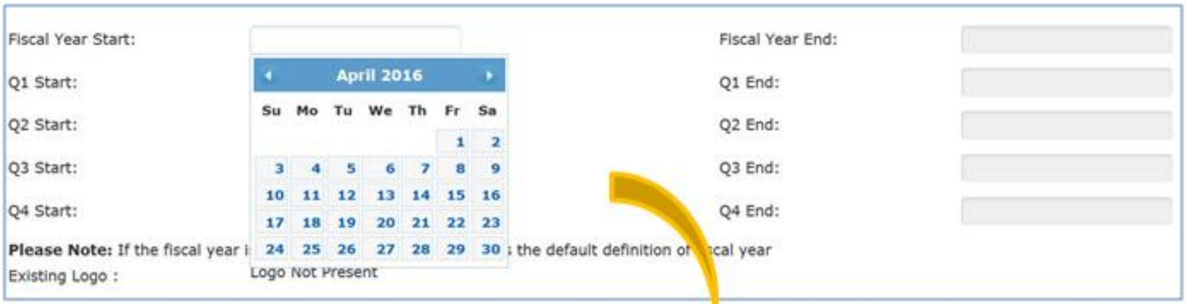
1

Configure the display settings as per your company's requirement.

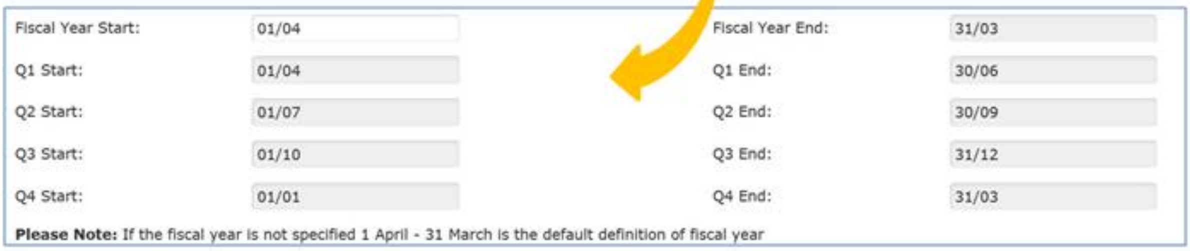
Browse for your company's logo with recommended dimension as 100x30 px.

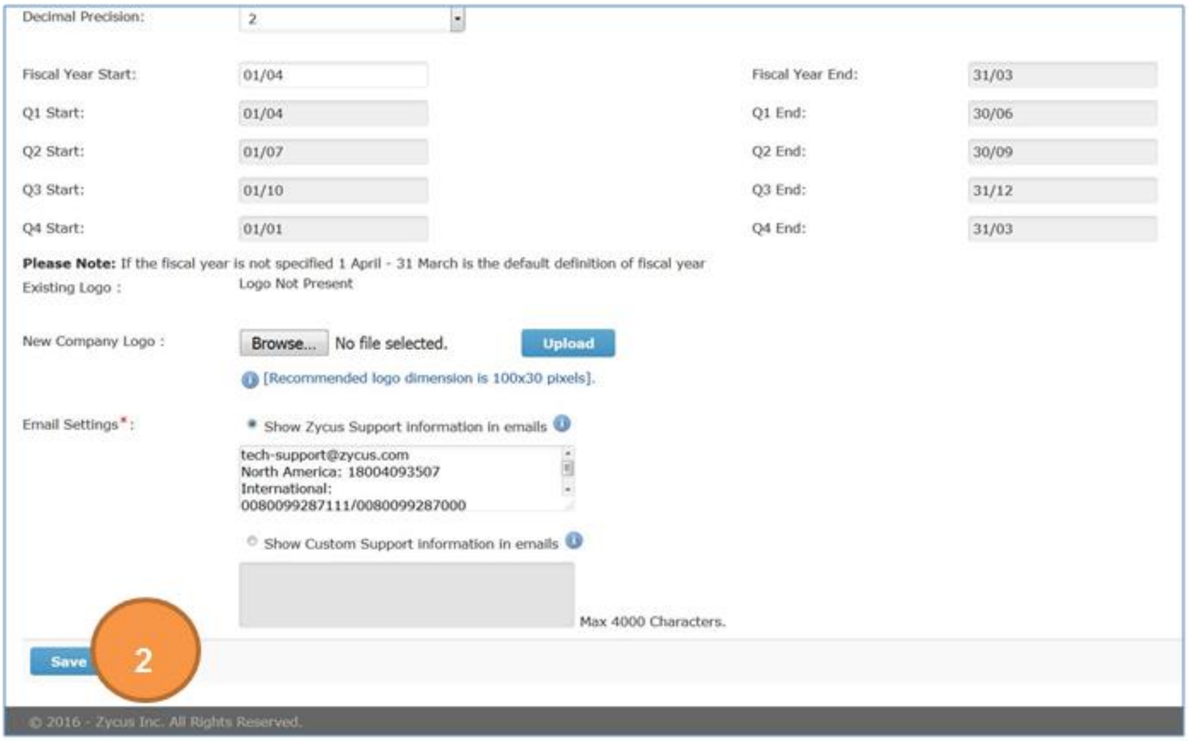
Select if you want to display Zycus Support information or your company's support information.

When Decimal Precision is 2, then the values after decimal will be rounded up to 2 digits, for example: 123.45



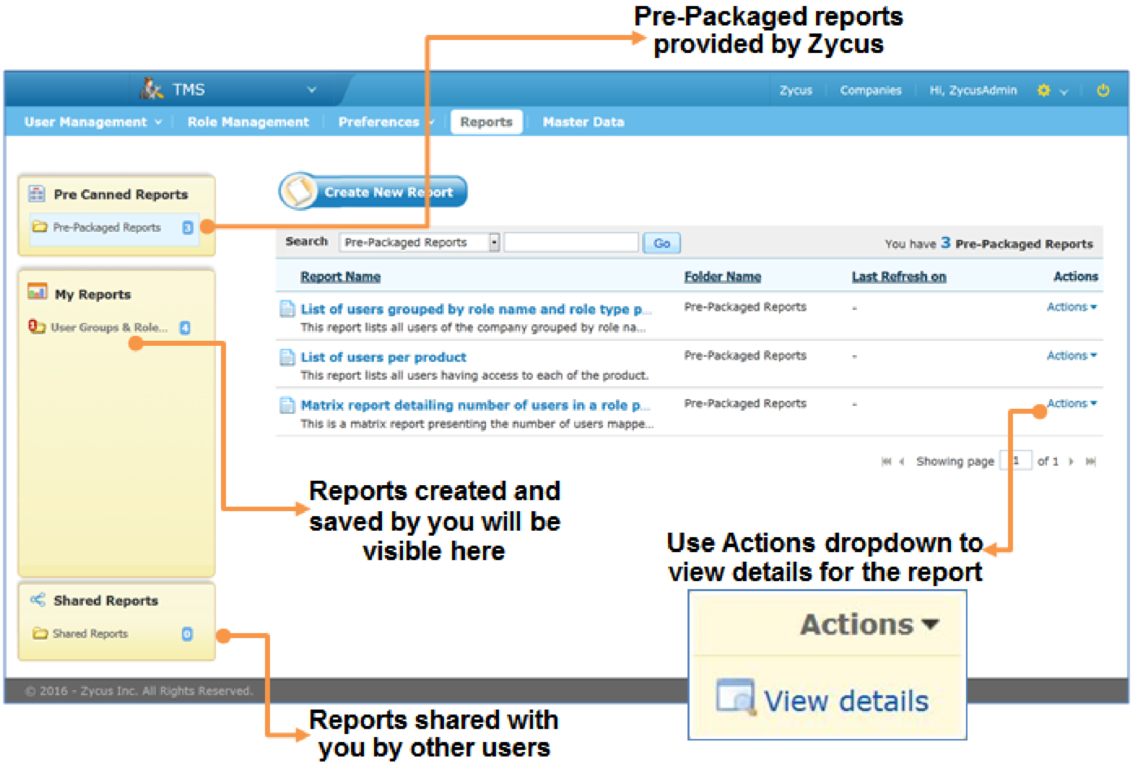
Pick a date for Fiscal Year Start and all the other values will be auto-populated.





Chapter 5. Reports

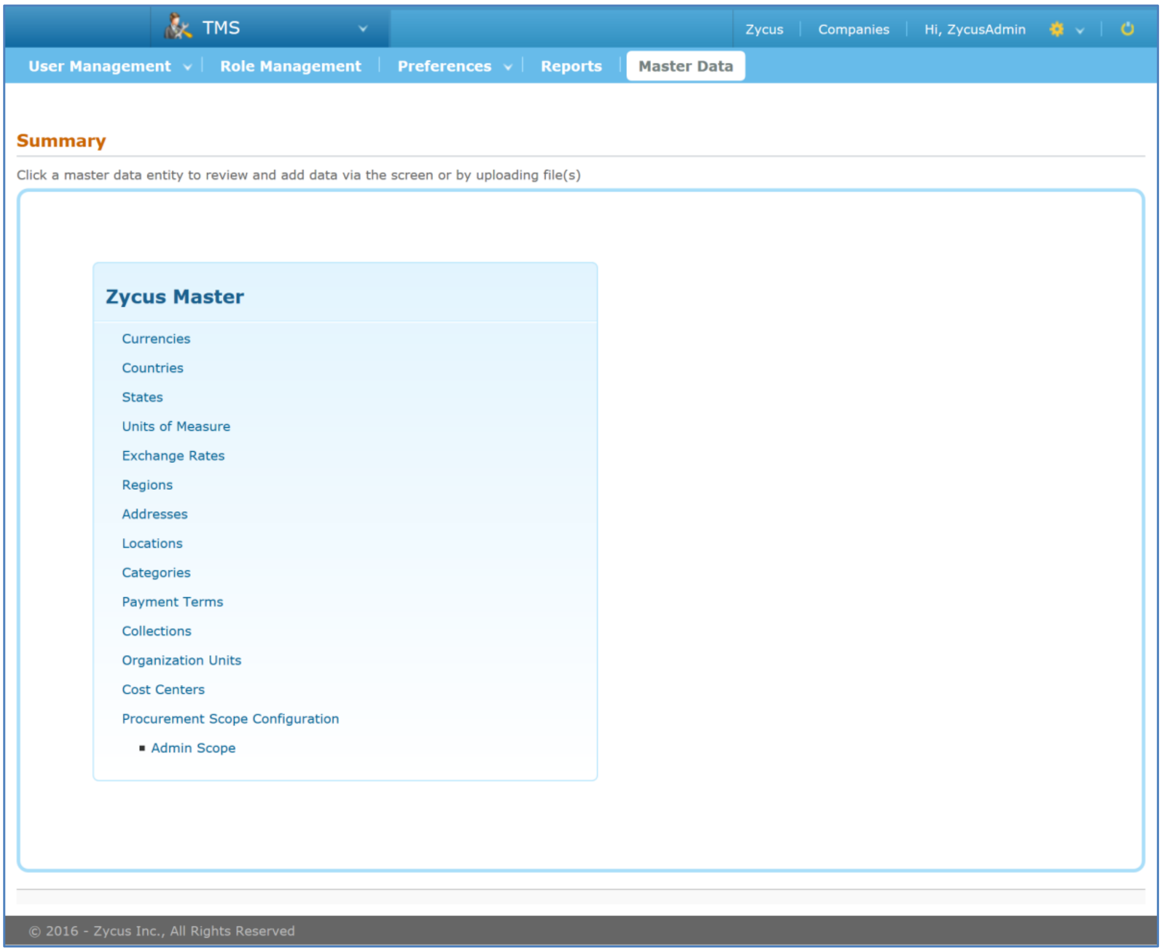
Understanding Reports Page



You can share a custom report (created by you) with the users who have access to the TMS.

Chapter 6. Master Data

From this page, you can configure master data for your products.



Scope for Master Data

Sr. No.	Master Data Parameters	Actions You Can Take
1	Currencies	Edit, activate, deactivate
2	Countries	Edit, activate, deactivate
3	States	Edit, activate, deactivate
4	Unit of Measure	Add, edit, activate, deactivate
5	Exchange Rates	Add, bulk upload, activate, deactivate
6	Region	Add, bulk upload, activate, deactivate, edit, delete
7	Address	Add, bulk upload, activate, deactivate, edit, delete
8	Location	Add, bulk upload, activate, deactivate, edit, delete
9	Category	Configure UNSPSC category. Configure, bulk upload, activate, deactivate, edit, delete Custom category
10	Payment Terms	Add, bulk upload, activate, deactivate, edit
11	Collections	Add, add entry, activate, deactivate
12	Organization Units	Add, edit, delete
13	Cost Centers	Add, edit, delete, activate, deactivate
14	Procurement Scope Configuration	Add, Edit, View scope elements

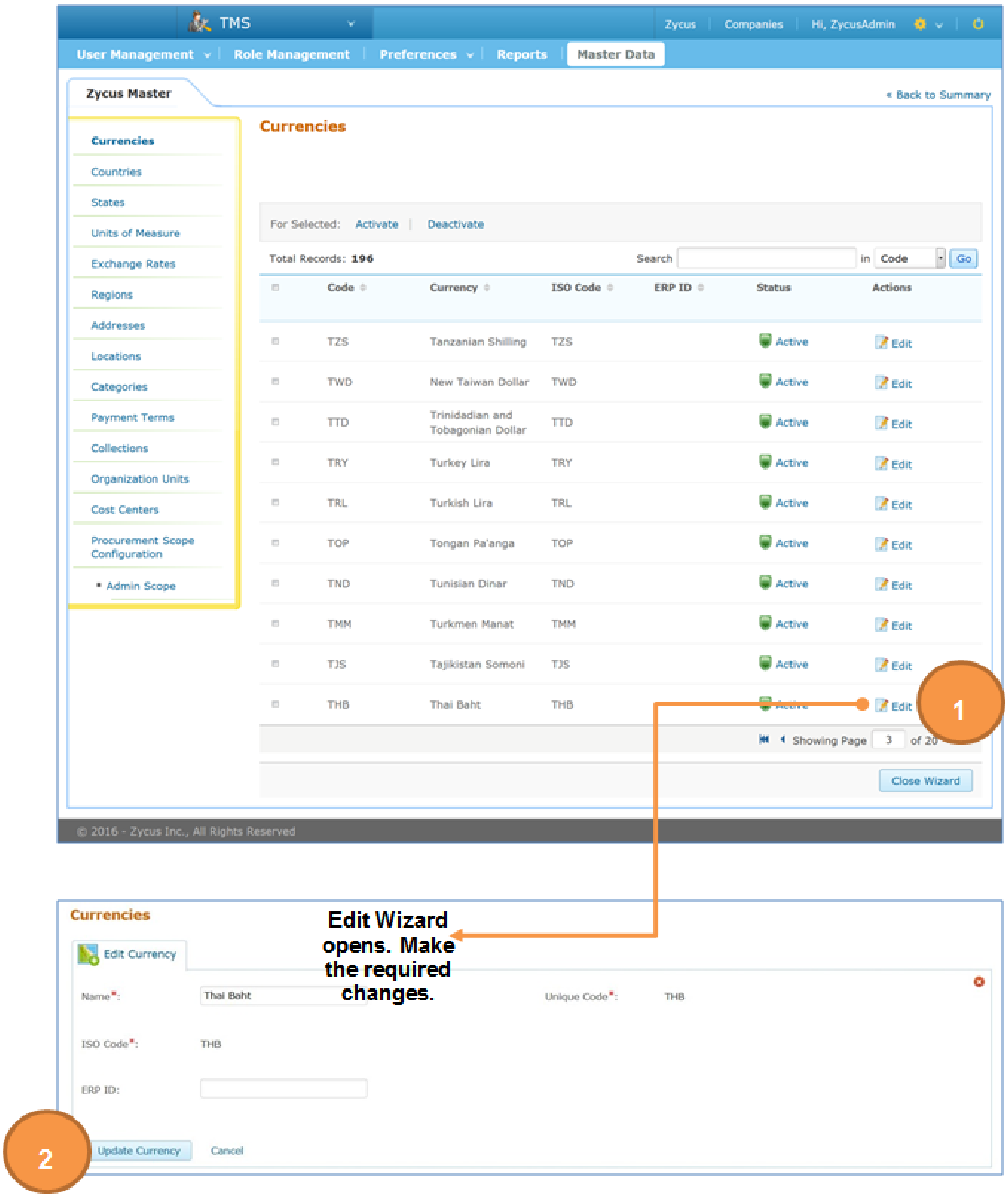
Note:

When you "activate" an entity, it will be visible and available to use throughout the product.

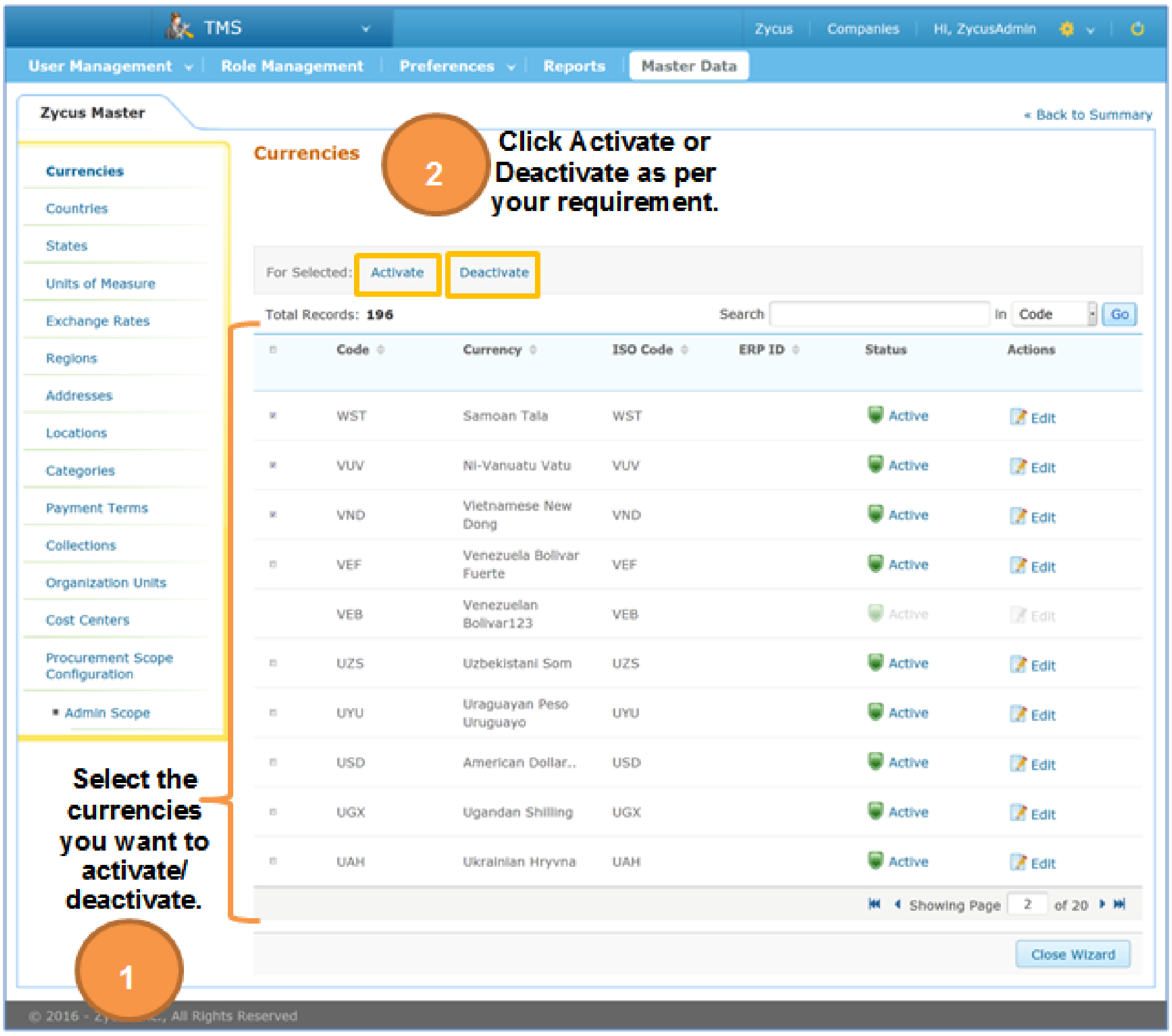
When you "deactivate" an entity, it will not be visible and not be available to use throughout the product.

Currencies

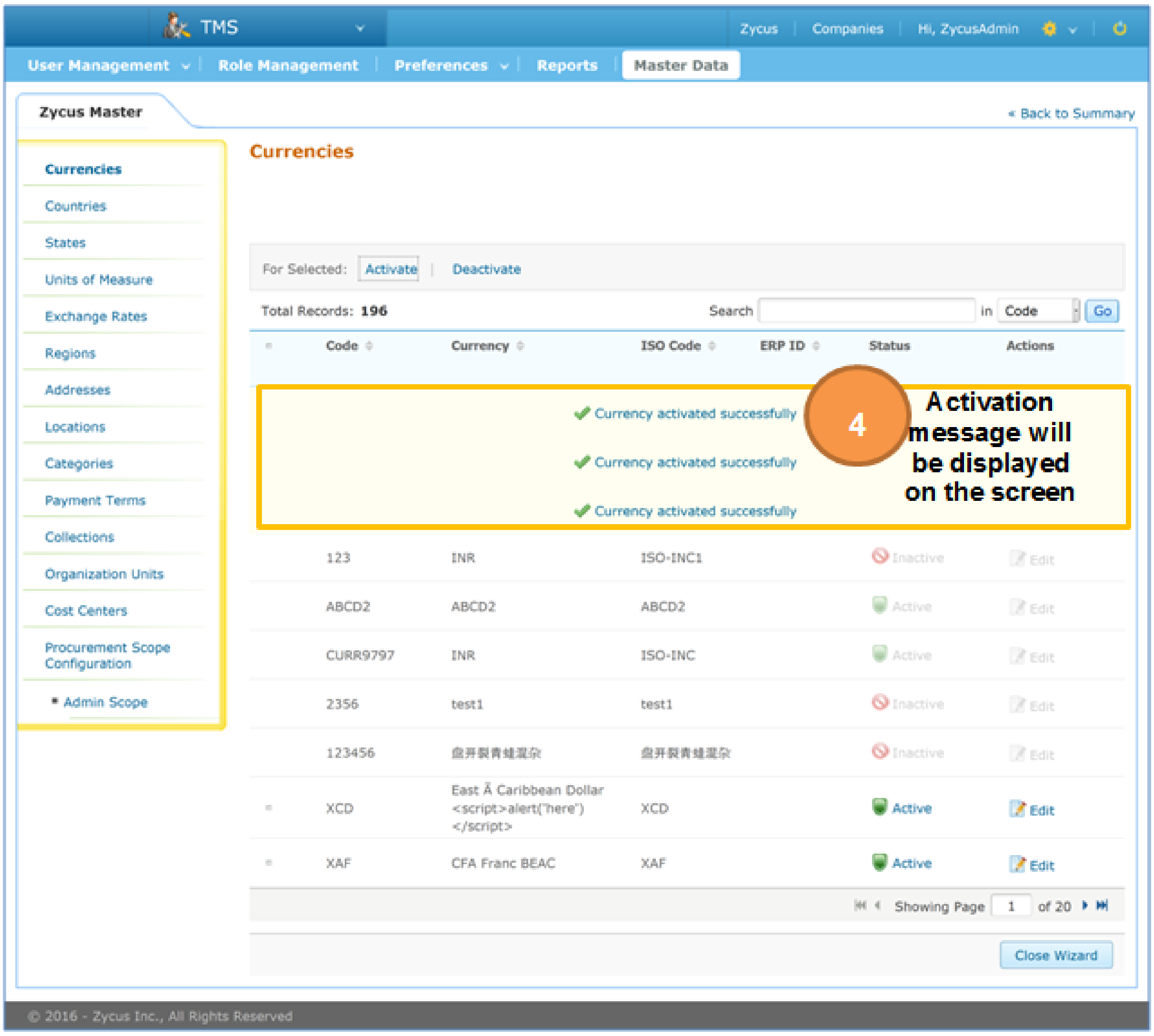
How to Edit the Currencies Provided For My Products?



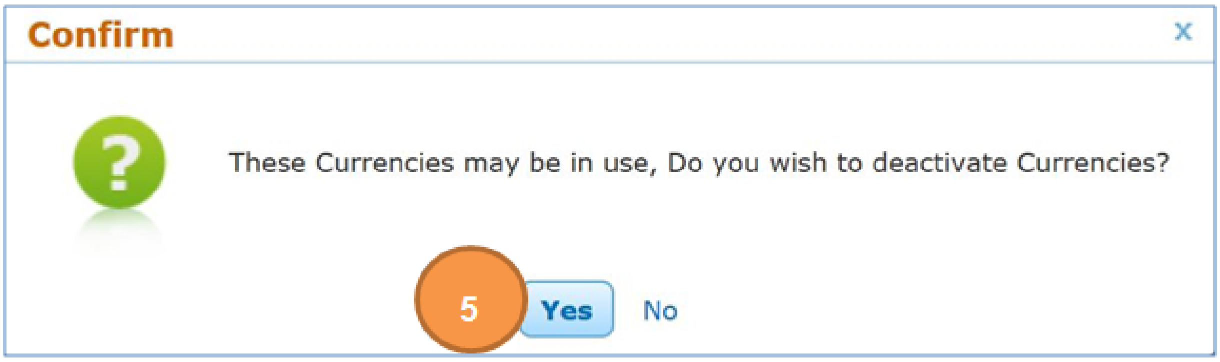
How Do I Activate/Deactivate the Currencies Provided For My Products?

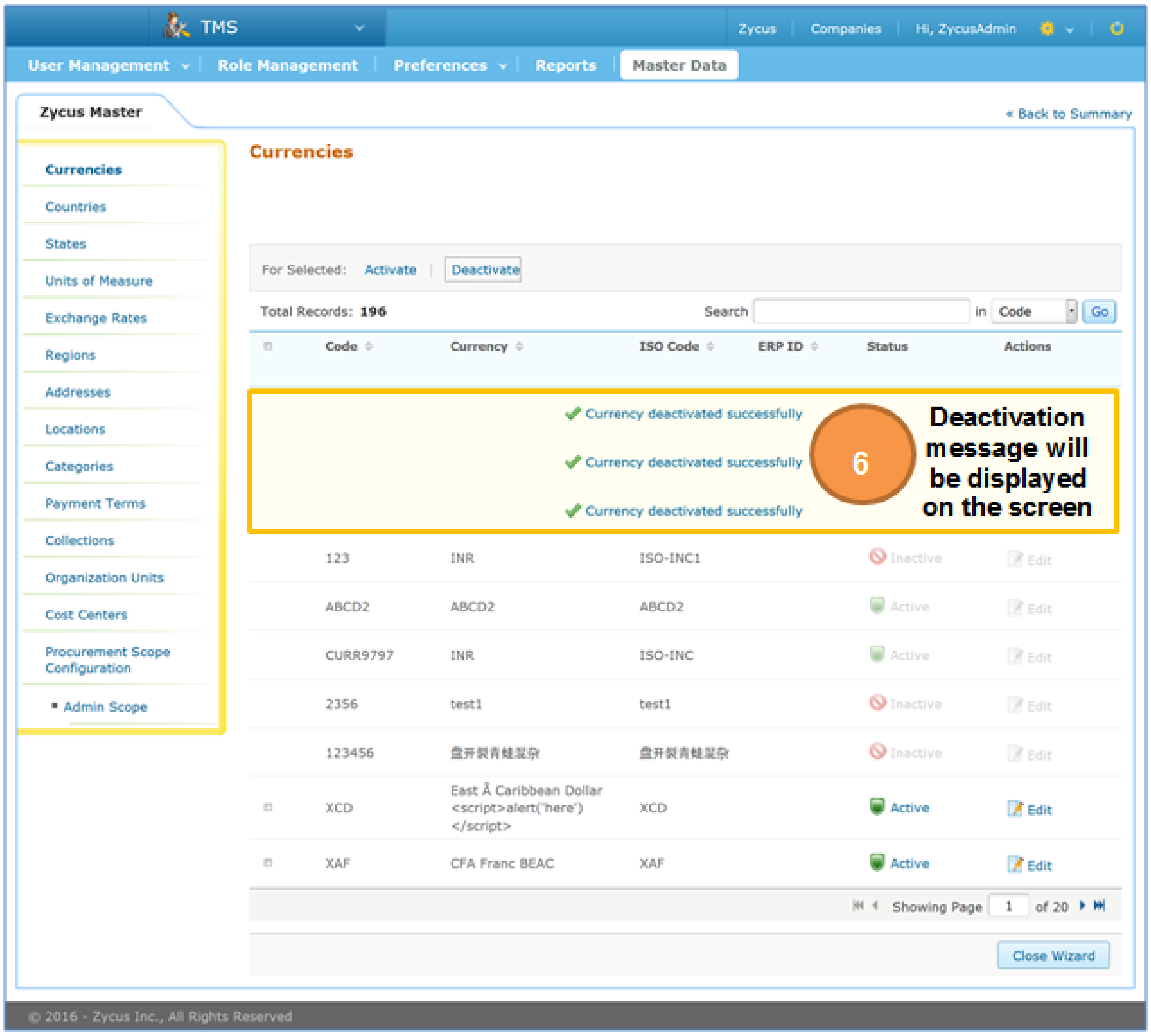


If you choose to activate:



If you choose to deactivate:




TMS
Zycus | Companies | Hi, ZycusAdmin
User Management | Role Management | Preferences | Reports | Master Data
Zycus Master
« Back to Summary
Currencies
Countries
States
Units of Measure
Exchange Rates
Regions
Addresses
Locations
Categories
Payment Terms
Collections
Organization Units
Cost Centers
Procurement Scope Configuration
Admin Scope
Currencies
For Selected: Activate | Deactivate
Total Records: 196
Search
in Code
Go
Code
Currency
ISO Code
ERP ID
Status
Actions
Currency deactivated successfully
Currency deactivated successfully
Currency deactivated successfully
6
Deactivation message will be displayed on the screen
123 INR ISO-INC1 Inactive Edit
ABCD2 ABCD2 ABCD2 Active Edit
CURR9797 INR ISO-INC Active Edit
2356 test1 test1 Inactive Edit
123456 Inactive Edit
XCD East Â Caribbean Dollar <script>alert('here')</script> XCD Active Edit
XAF CFA Franc BEAC XAF Active Edit
Showing Page 1 of 20
Close Wizard
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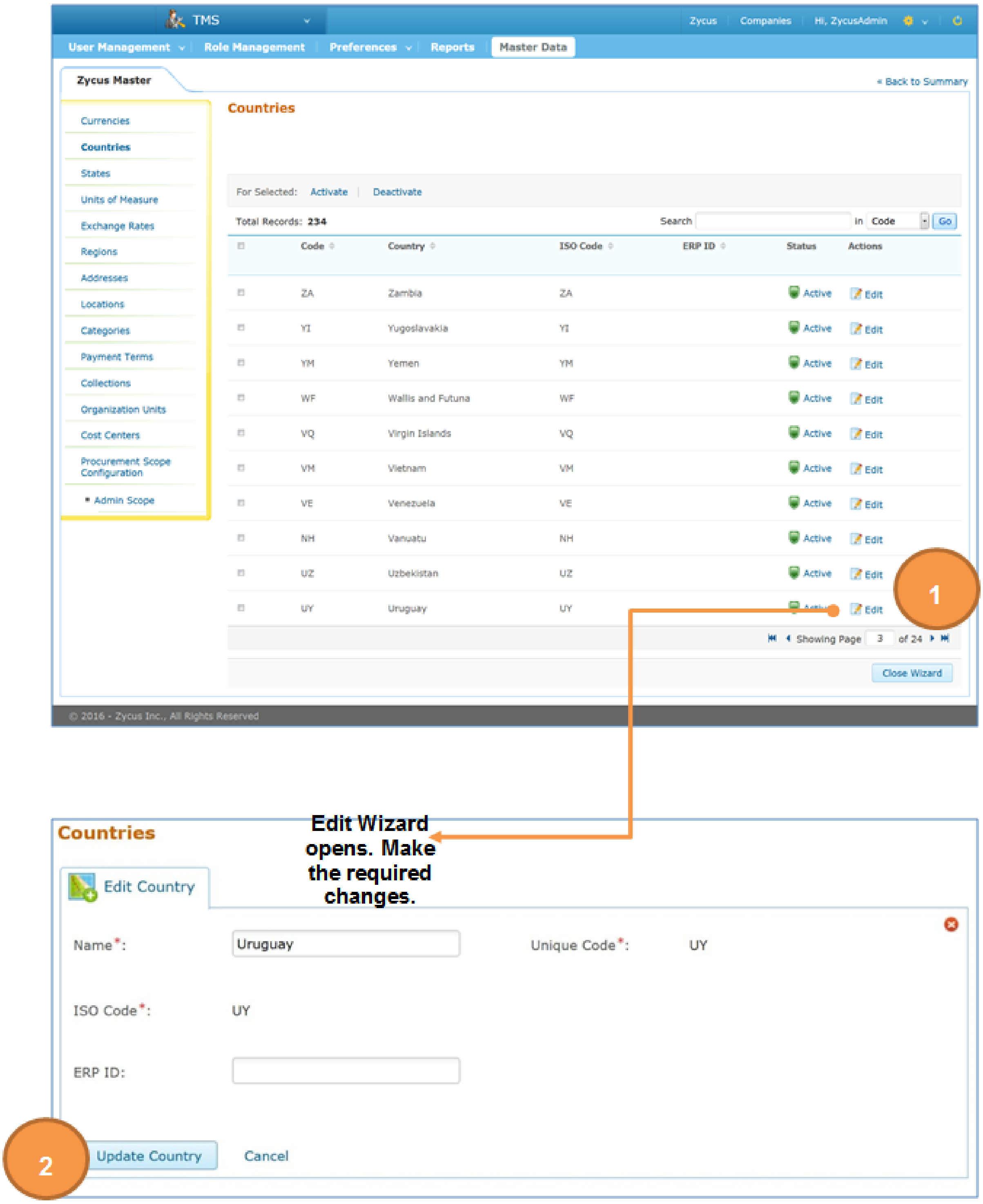
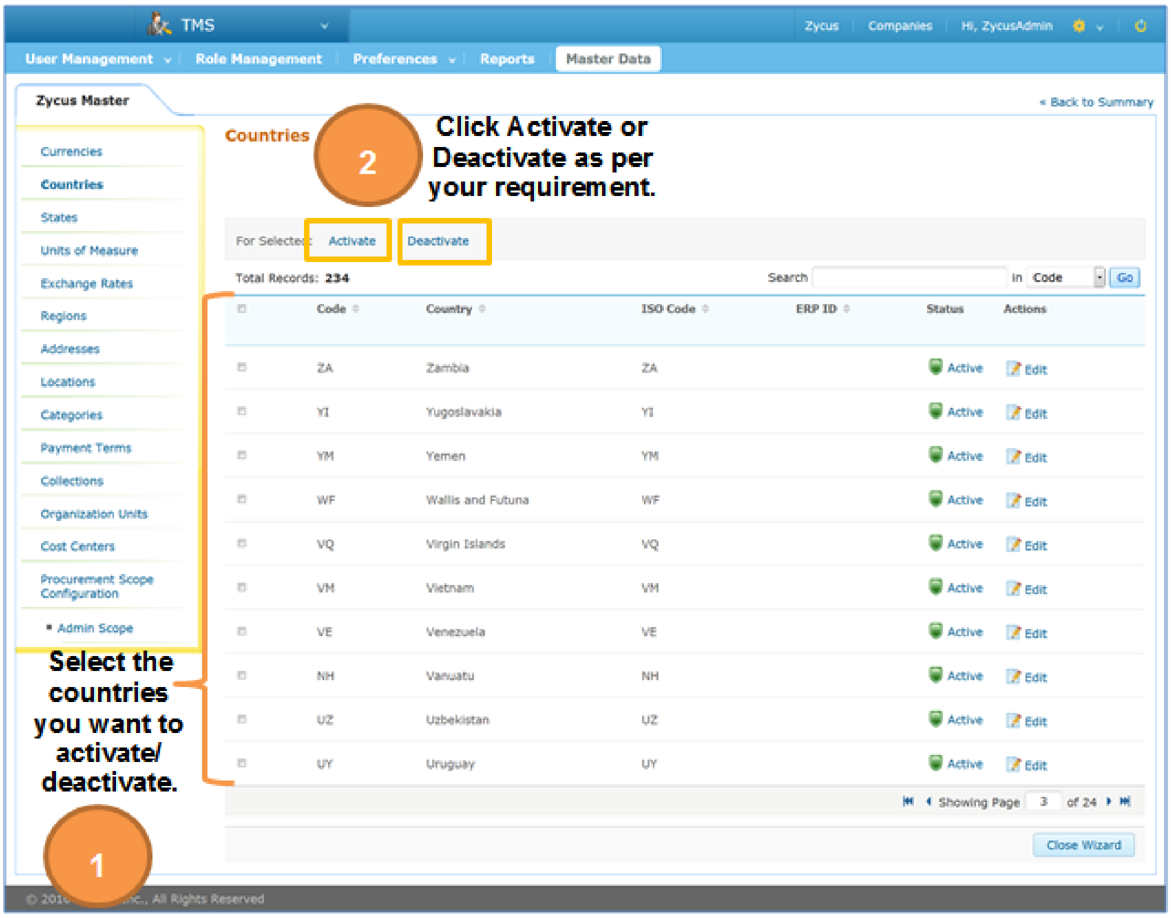
Countries

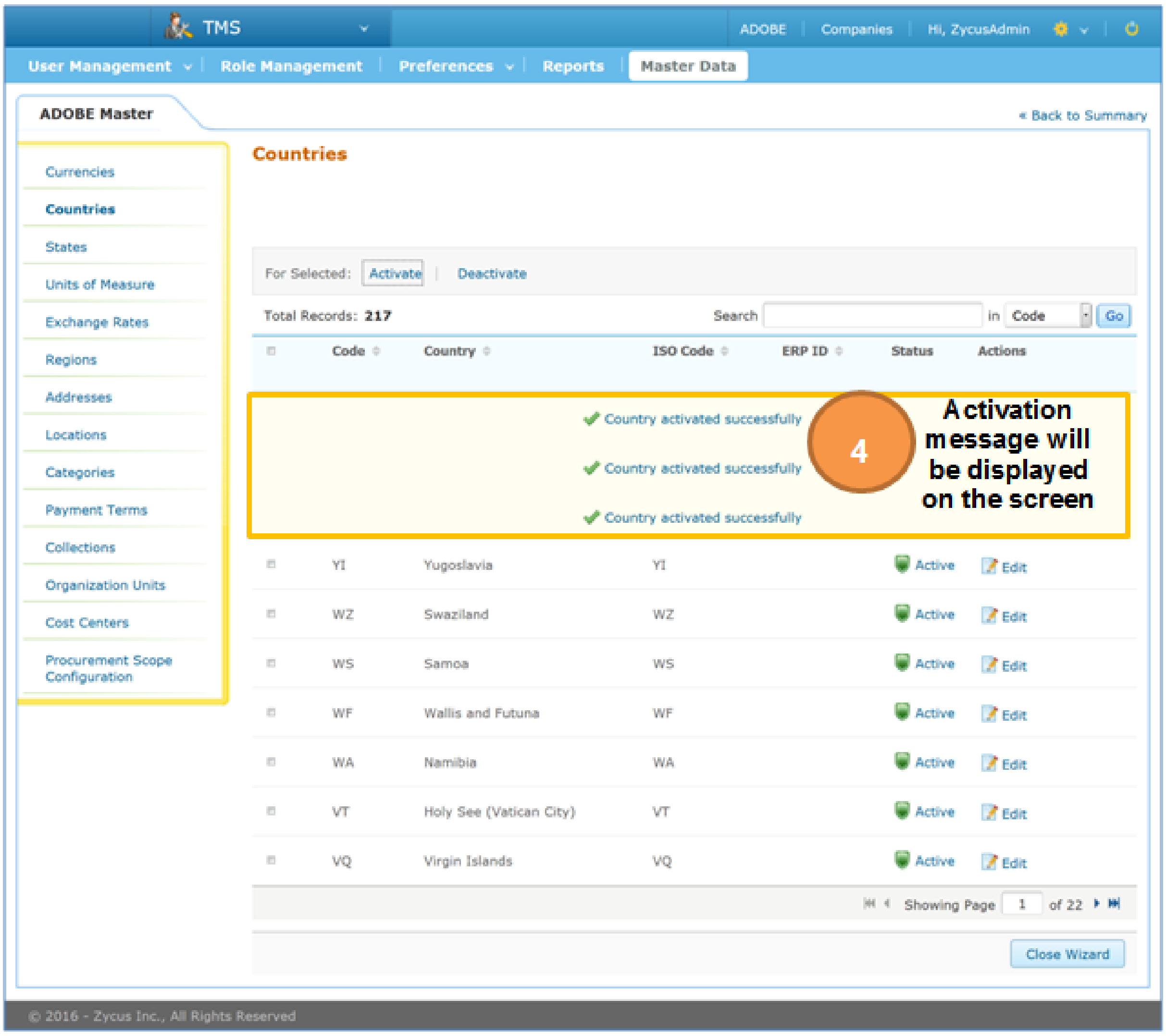
How to Edit Countries Provided For My Products?



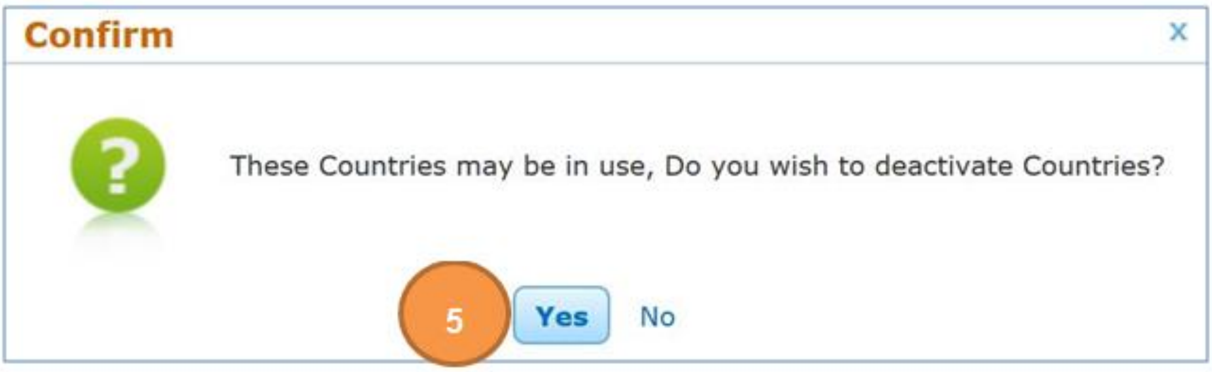
How Do I Activate/Deactivate the Countries Provided For My Products?

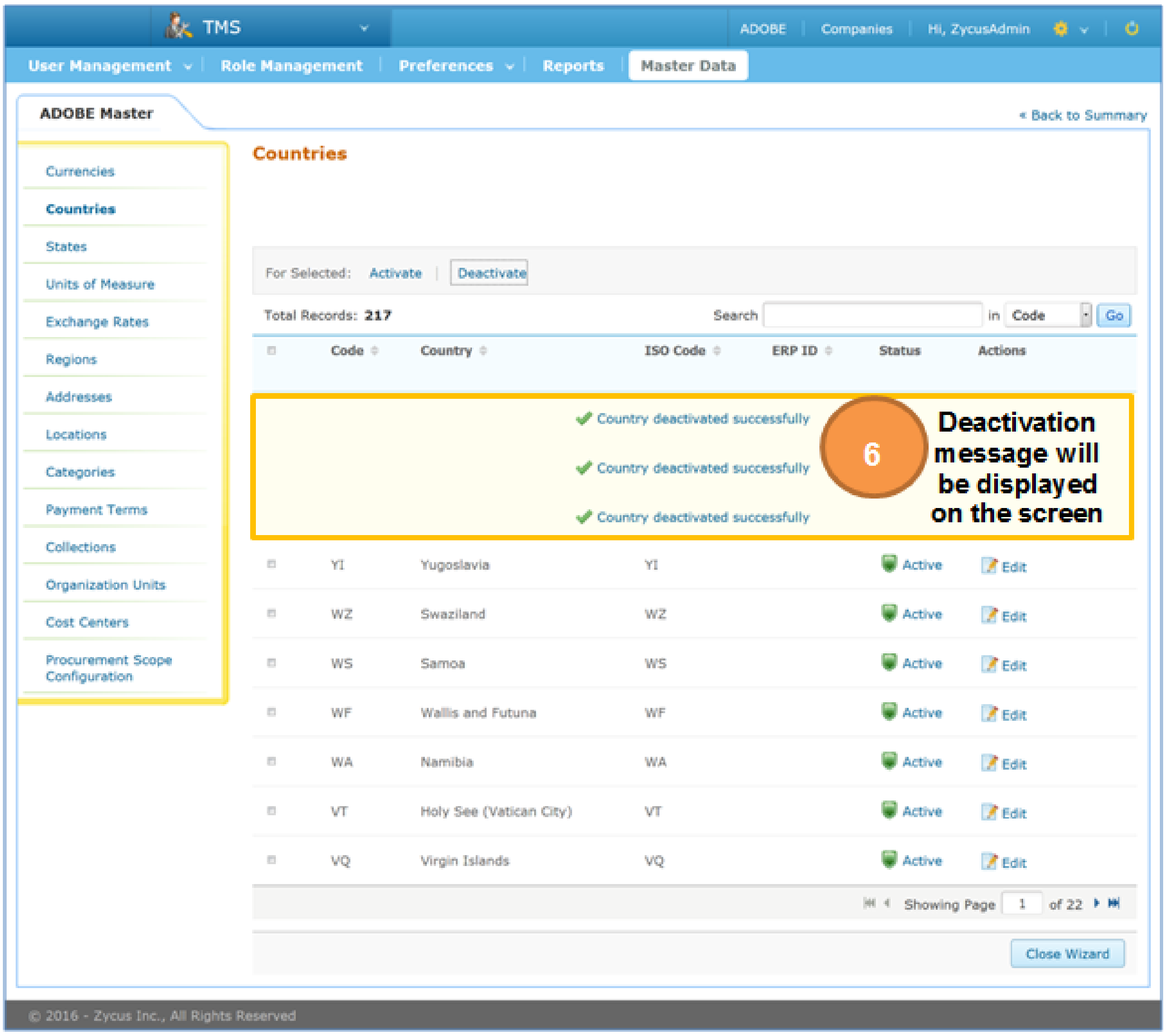


If you choose to activate:



If you choose to deactivate:




TMS
ADOBE | Companies | Hi, ZycusAdmin
User Management | Role Management | Preferences | Reports | Master Data
ADOBE Master
« Back to Summary
Currencies
Countries
States
Units of Measure
Exchange Rates
Regions
Addresses
Locations
Categories
Payment Terms
Collections
Organization Units
Cost Centers
Procurement Scope Configuration
Countries
For Selected: Activate | Deactivate
Total Records: 217
Search
in Code
Go
Code
Country
ISO Code
ERP ID
Status
Actions
Country deactivated successfully
Country deactivated successfully
Country deactivated successfully
6
Deactivation message will be displayed on the screen
YI Yugoslavia YI Active Edit
WZ Swaziland WZ Active Edit
WS Samoa WS Active Edit
WF Wallis and Futuna WF Active Edit
WA Namibia WA Active Edit
VT Holy See (Vatican City) VT Active Edit
VQ Virgin Islands VQ Active Edit
Showing Page 1 of 22
Close Wizard
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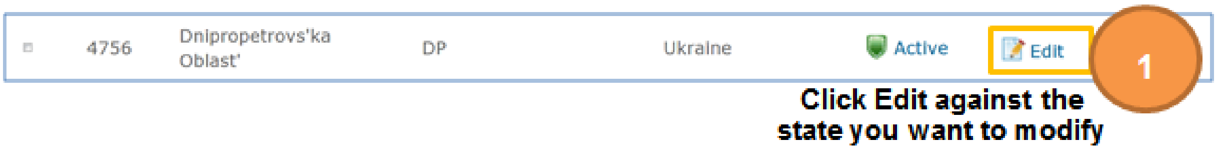
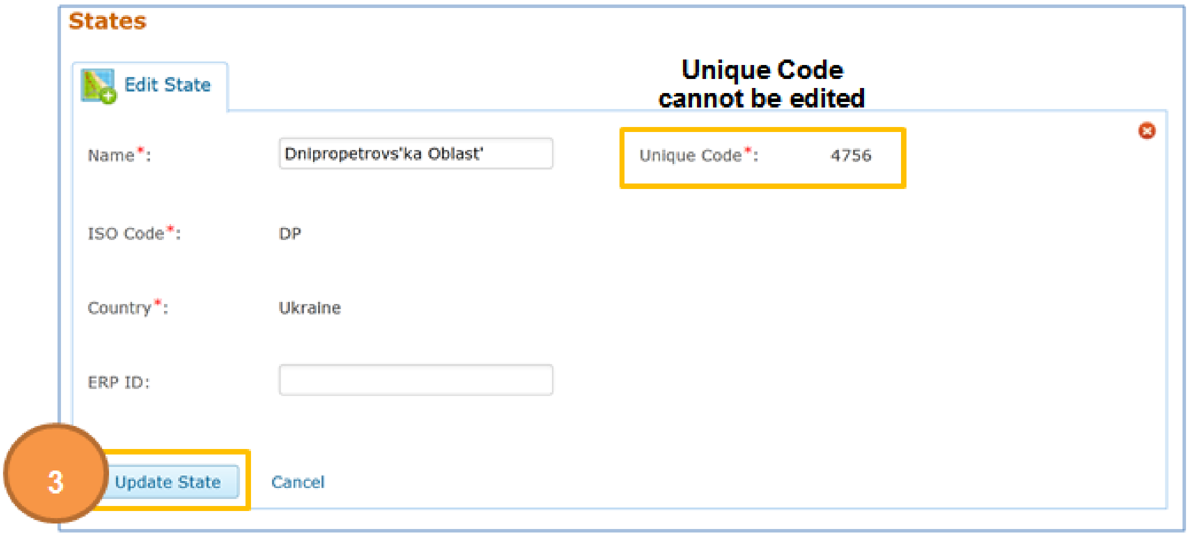
States

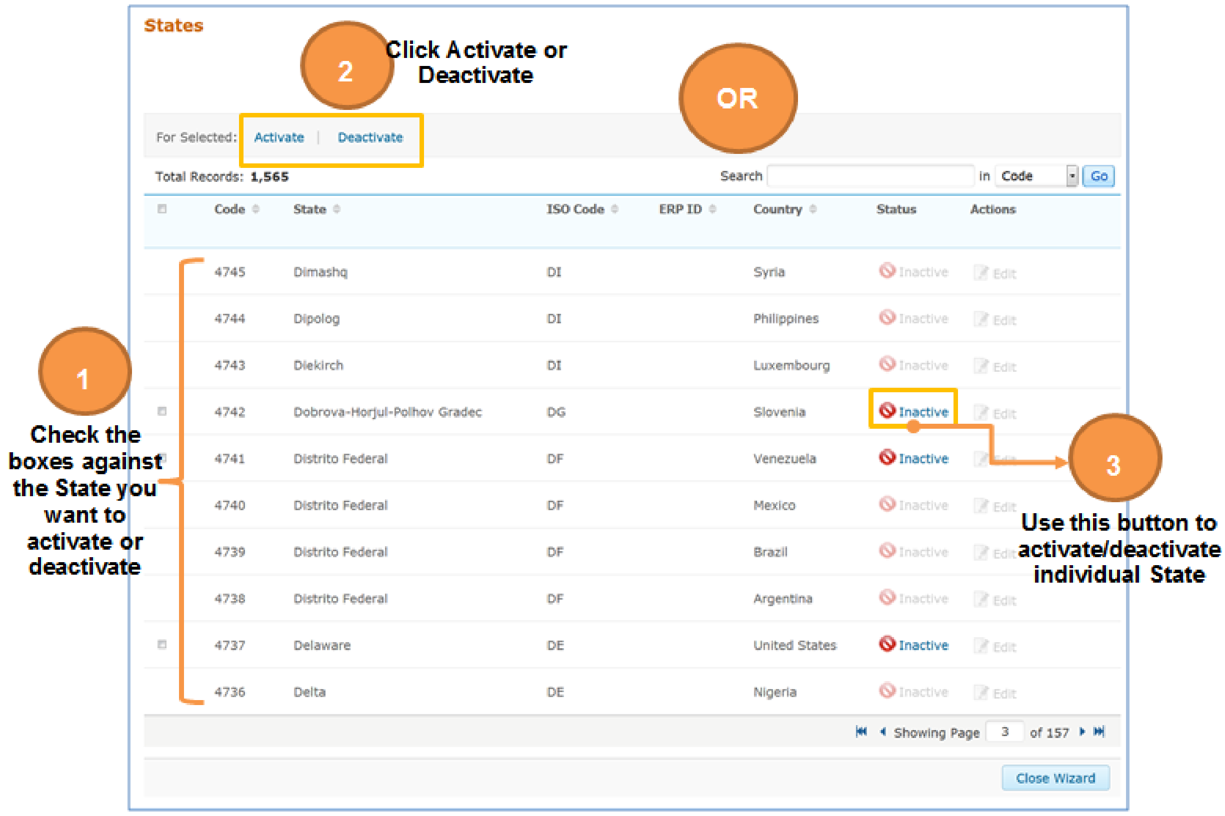
How to Edit a State?





Reference: Follow the same steps as shown for How to Edit the Currencies Provided For My Products?

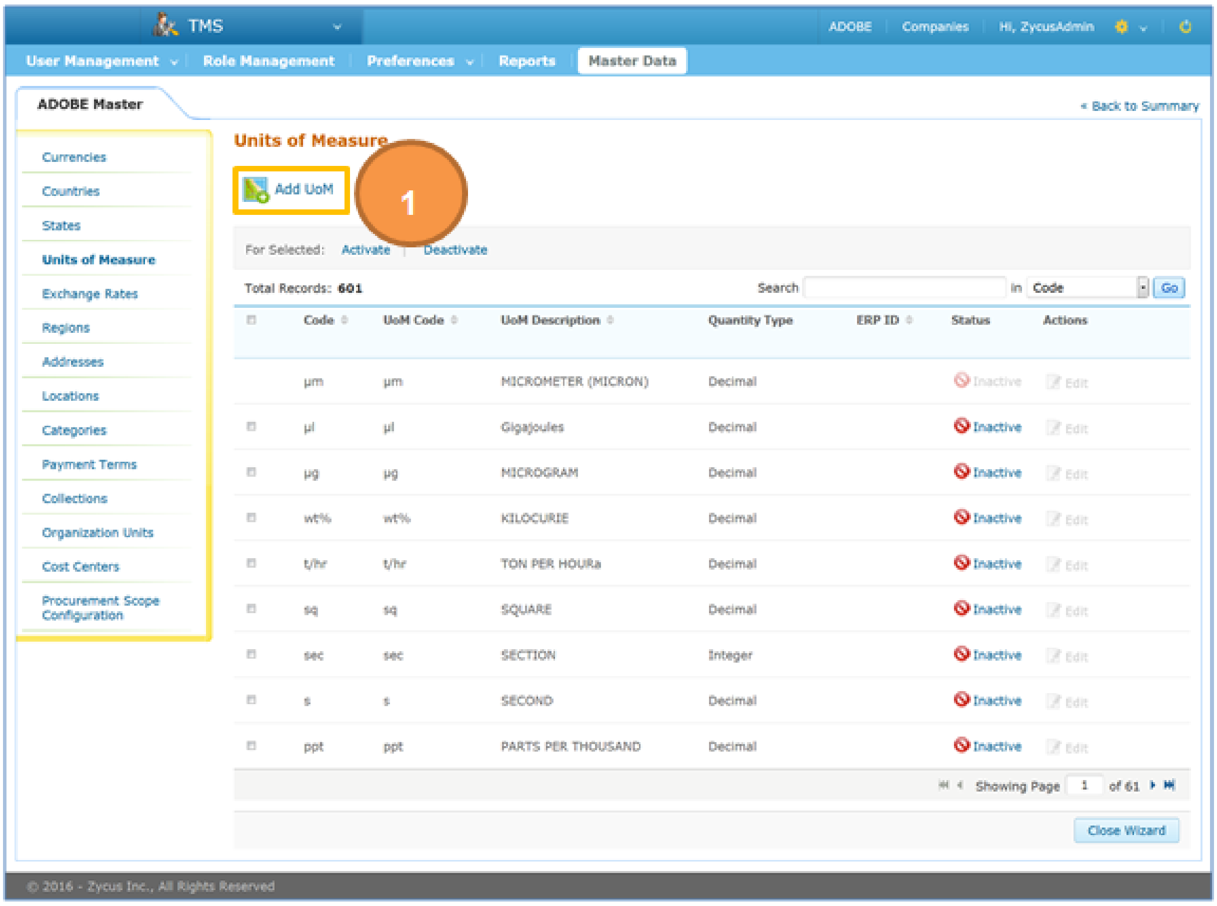
How Do I Activate/Deactivate the States Provided For My Products?

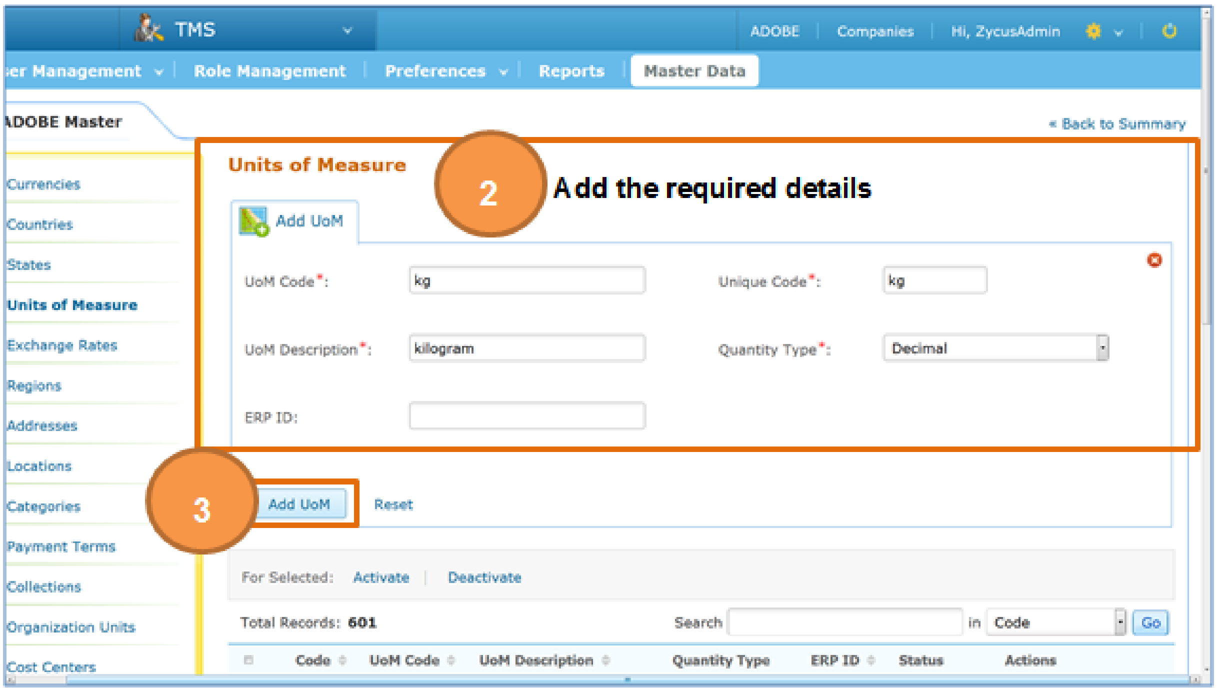


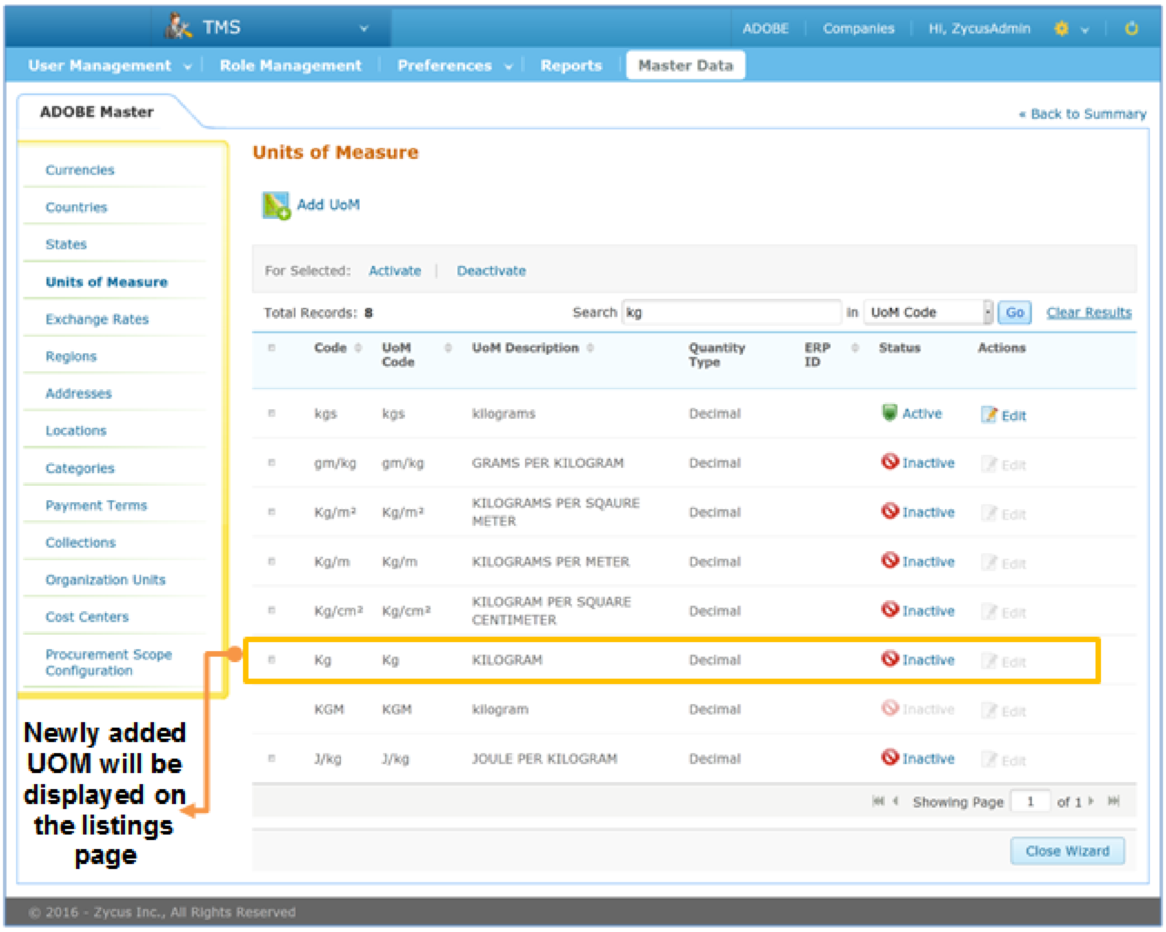
Reference: Follow the same steps as shown for [How Do I Activate/Deactivate the Currencies Provided For My Products?]

Unit of Measures

How to Add Unit of Measures?






TMS
ADOBE
Companies
Hi, ZycusAdmin
User Management
Role Management
Preferences
Reports
Master Data
ADOBE Master
« Back to Summary
Currencies
Countries
States
Units of Measure
Exchange Rates
Regions
Addresses
Locations
Categories
Payment Terms
Collections
Organization Units
Cost Centers
Procurement Scope Configuration
Units of Measure
Add UoM
For Selected: Activate | Deactivate
Total Records: 8
Search kg in UoM Code Go Clear Results
Code UoM Code UoM Description Quantity Type ERP ID Status Actions
kgs kgs kilograms Decimal Active Edit
gm/kg gm/kg GRAMS PER KILOGRAM Decimal Inactive Edit
Kg/m² Kg/m² KILOGRAMS PER SQAURE METER Decimal Inactive Edit
Kg/m Kg/m KILOGRAMS PER METER Decimal Inactive Edit
Kg/cm² Kg/cm² KILOGRAM PER SQUARE CENTIMETER Decimal Inactive Edit
Kg Kg KILOGRAM Decimal Inactive Edit
KGM KGM kilogram Decimal Inactive Edit
J/kg J/kg JOULE PER KILOGRAM Decimal Inactive Edit
Showing Page 1 of 1
Close Wizard
Newly added UOM will be displayed on the listings page
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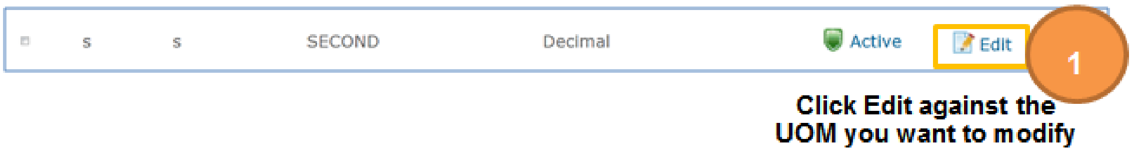
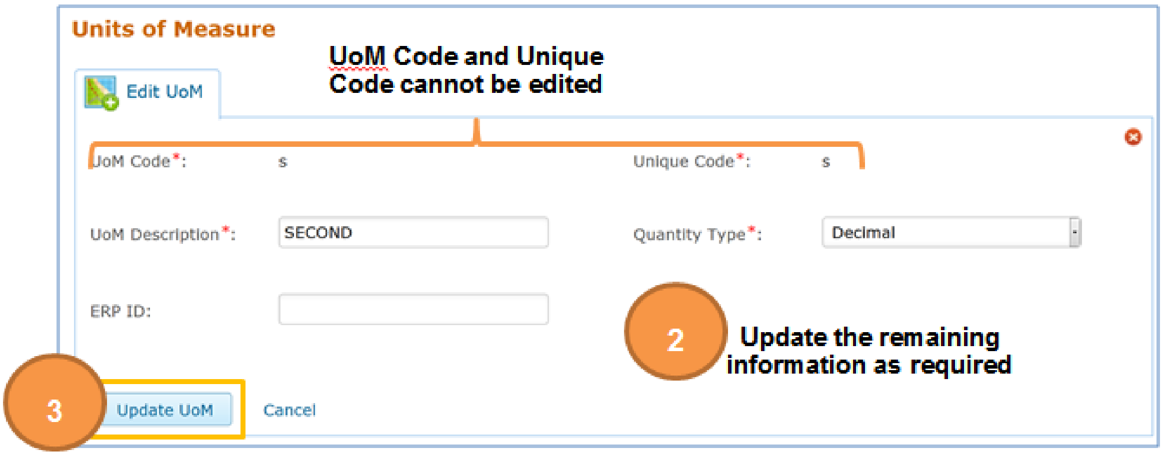
How to Edit Unit of Measures?

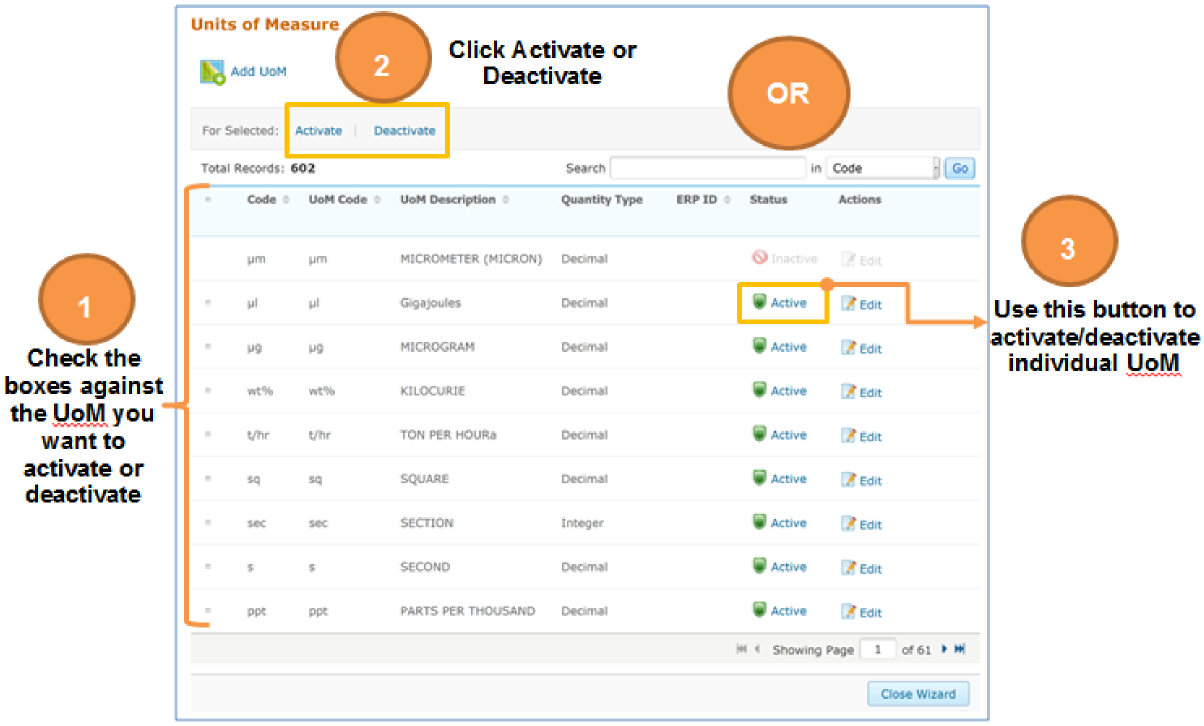




How Do I Activate/Deactivate the Unit of Measures?

Steps to activate or deactivate any master data are same.

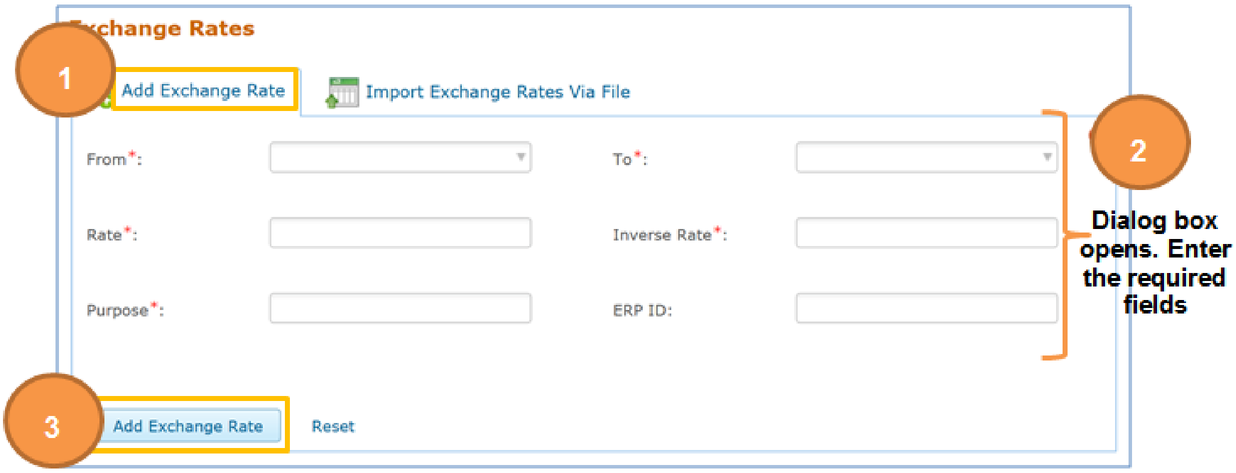
To activate multiple UoM, use the checkboxes as displayed below:



Reference: Follow the same steps as shown for [How Do I Activate/Deactivate the Currencies Provided For My Products?]

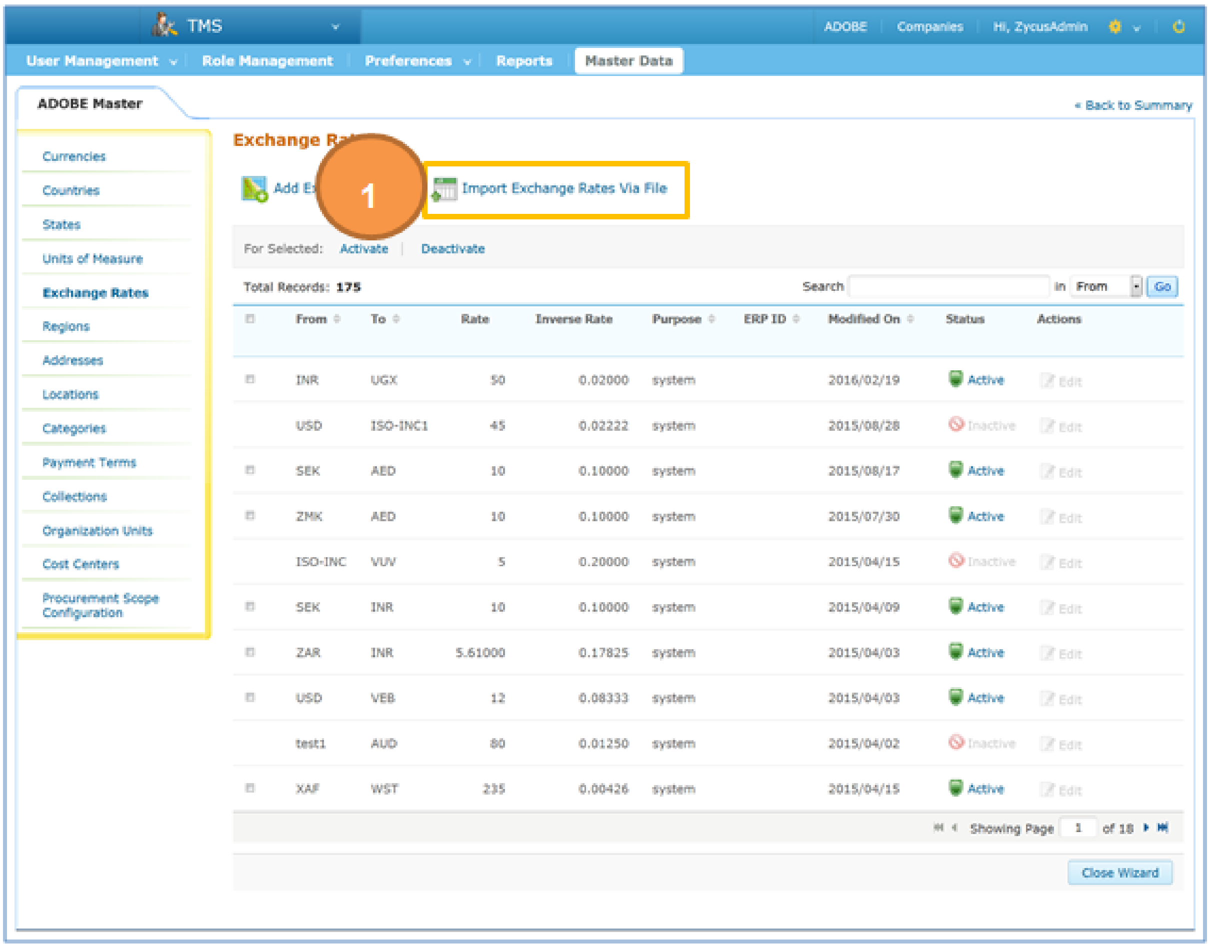
Exchange Rates

How to Add Exchange Rates?

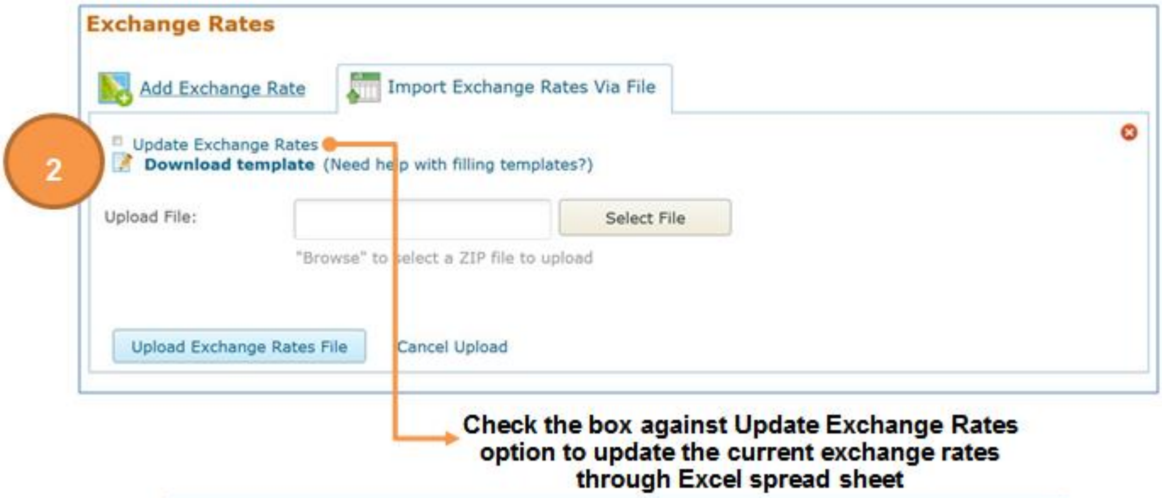


Reference: Follow the same steps as shown for How to Add Unit of Measures?

How to Bulk Upload the Exchange Rates?



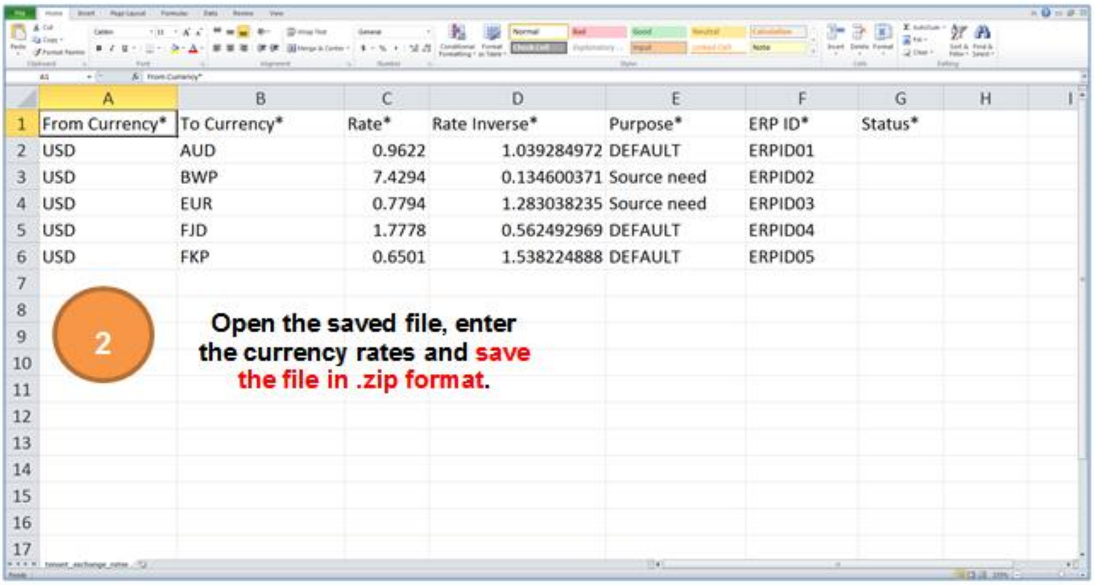
6.1.1.1 How to Update the Current Exchange Rates through Excel Spread Sheet?

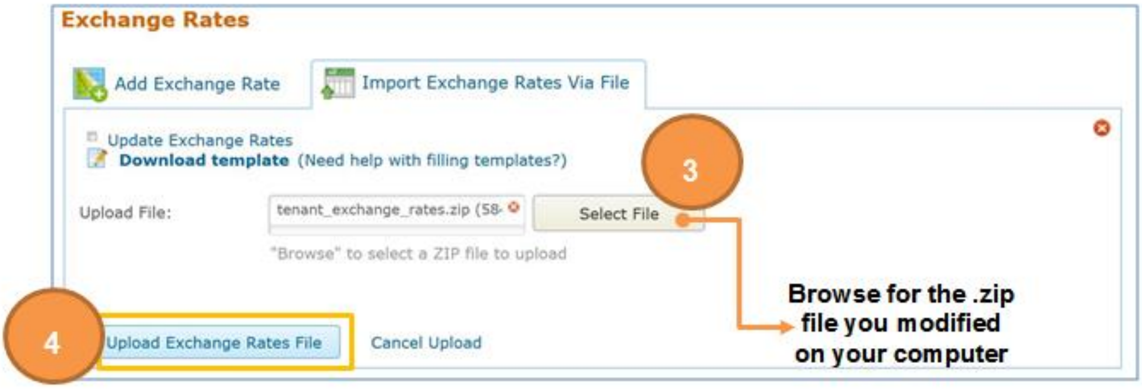


6.1.1.2 How To Fill In The Exchange Rates In Excel Spread Sheet And Bulk Upload Them?

The file you download will be a .zip file. Extract the spreadsheet from this .zip folder.

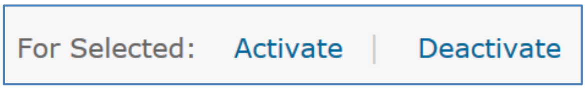
NOTE: *Try not changing the name of the file. It will be less hassle while you are uploading the file back to the tool.*





How to Activate/Deactivate the Exchange Rates?

Steps to activate or deactivate any master data are the same.

- **To activate/deactivate multiple exchange rates, use the checkbox.**
- **Use** 

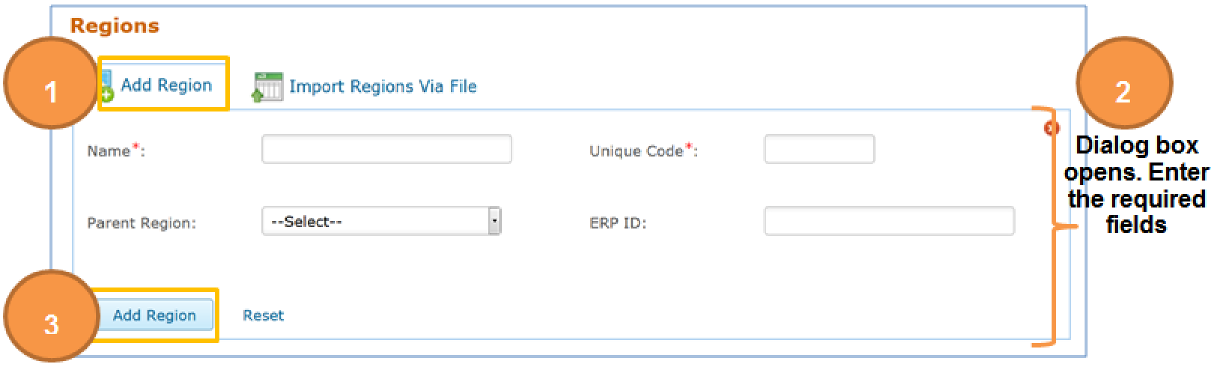
- **To activate/deactivate individual exchange rates, use** 

.

Reference: Follow the same steps as shown for [How Do I Activate/Deactivate the Currencies Provided For My Products?]

Regions

How to Add Regions?



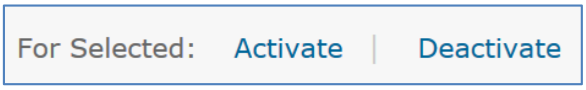
Reference: Follow the same steps as shown for [How to Add Unit of Measures?]

How to Bulk Upload the Regions?

Follow the same steps as shown for [How to Bulk Upload the Exchange Rates?]

How to Activate/Deactivate the Regions?

Steps to activate or deactivate any master data are the same.

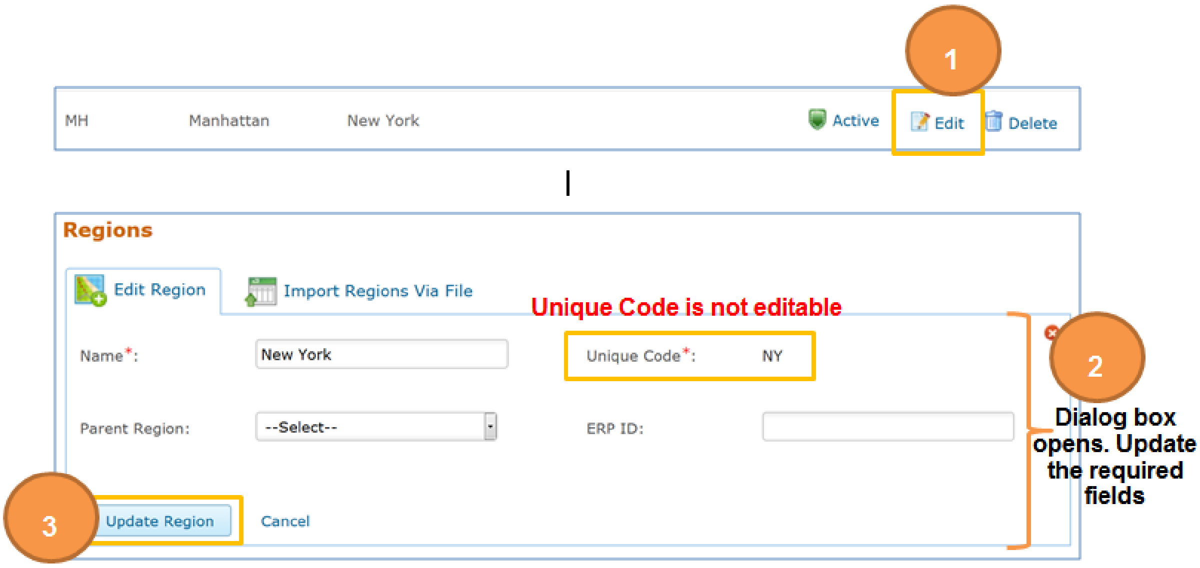
- **To activate/deactivate multiple regions, use the checkbox.**
- **Use** 

- **To activate/deactivate individual regions, use** 

.

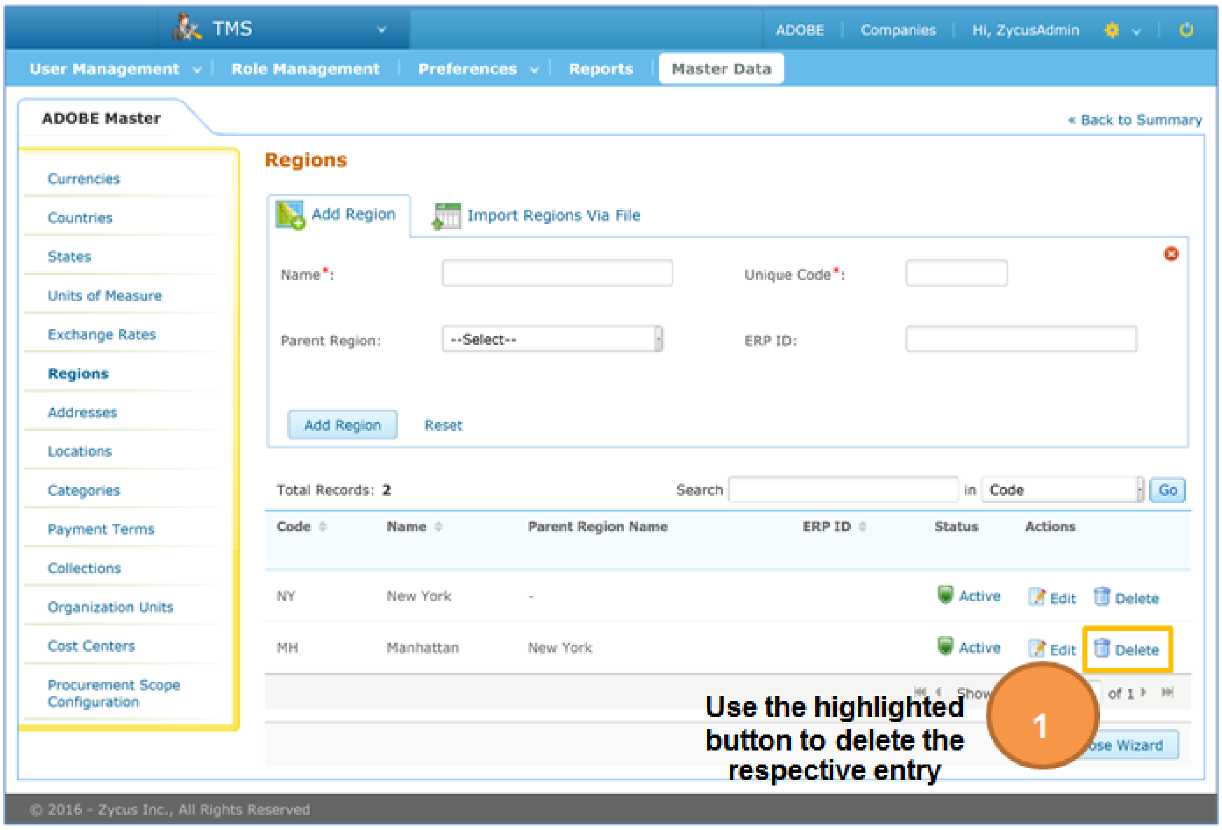
Reference: Follow the same steps as shown for [How Do I Activate/Deactivate the Currencies Provided For My Products?]

How to Edit the Regions?



Reference: Follow the same steps as shown for [How to Edit the Currencies Provided For My Products?]

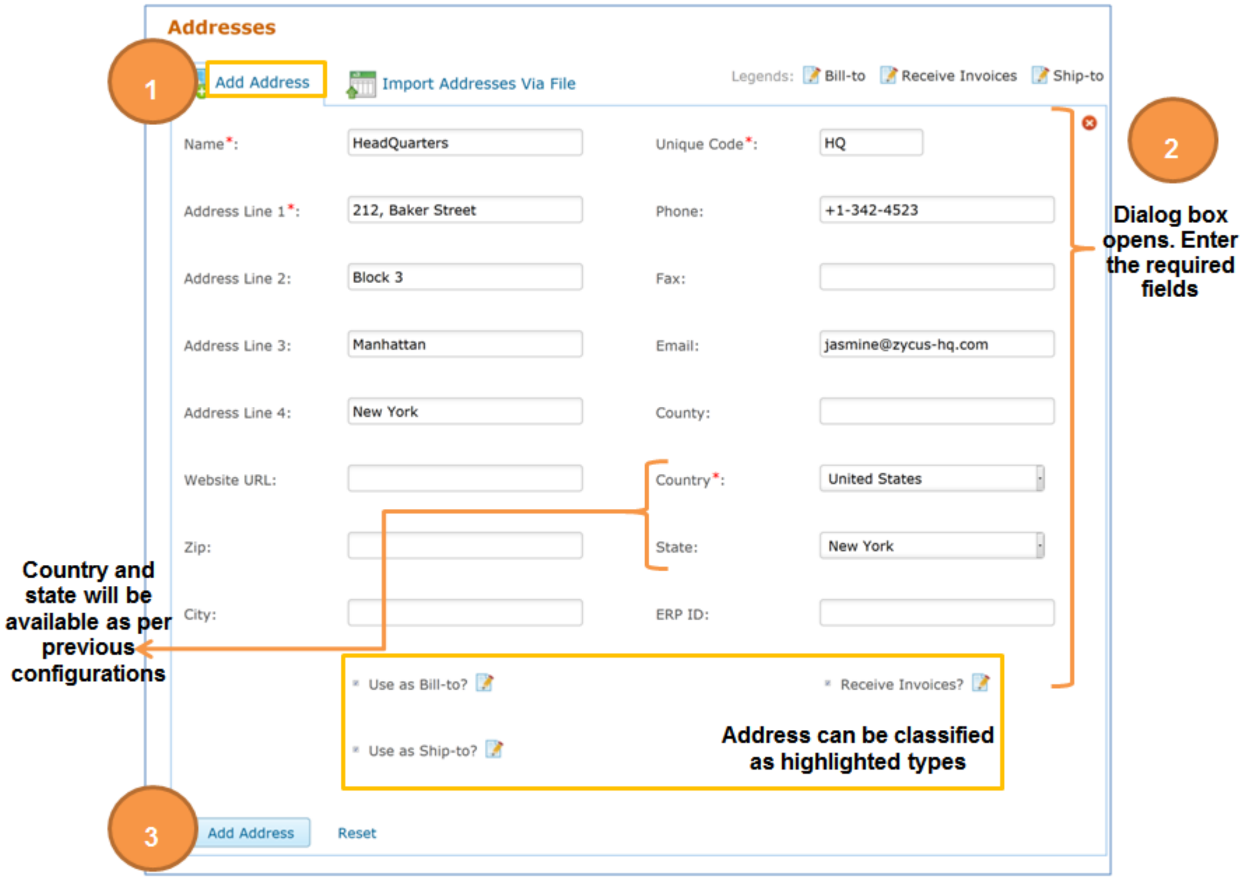
How to Delete the Regions?



Address

How to Add Addresses?

Note: *To add address, you will need to have complete data ready from Country and State.*

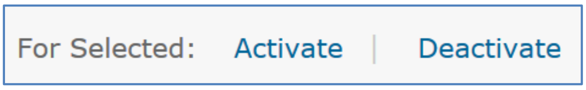


How to Bulk Upload the Address?

Follow the same steps as shown for How to Bulk Upload the Exchange Rates?

How to Activate/Deactivate the Address?

Steps to activate or deactivate any master data are the same.

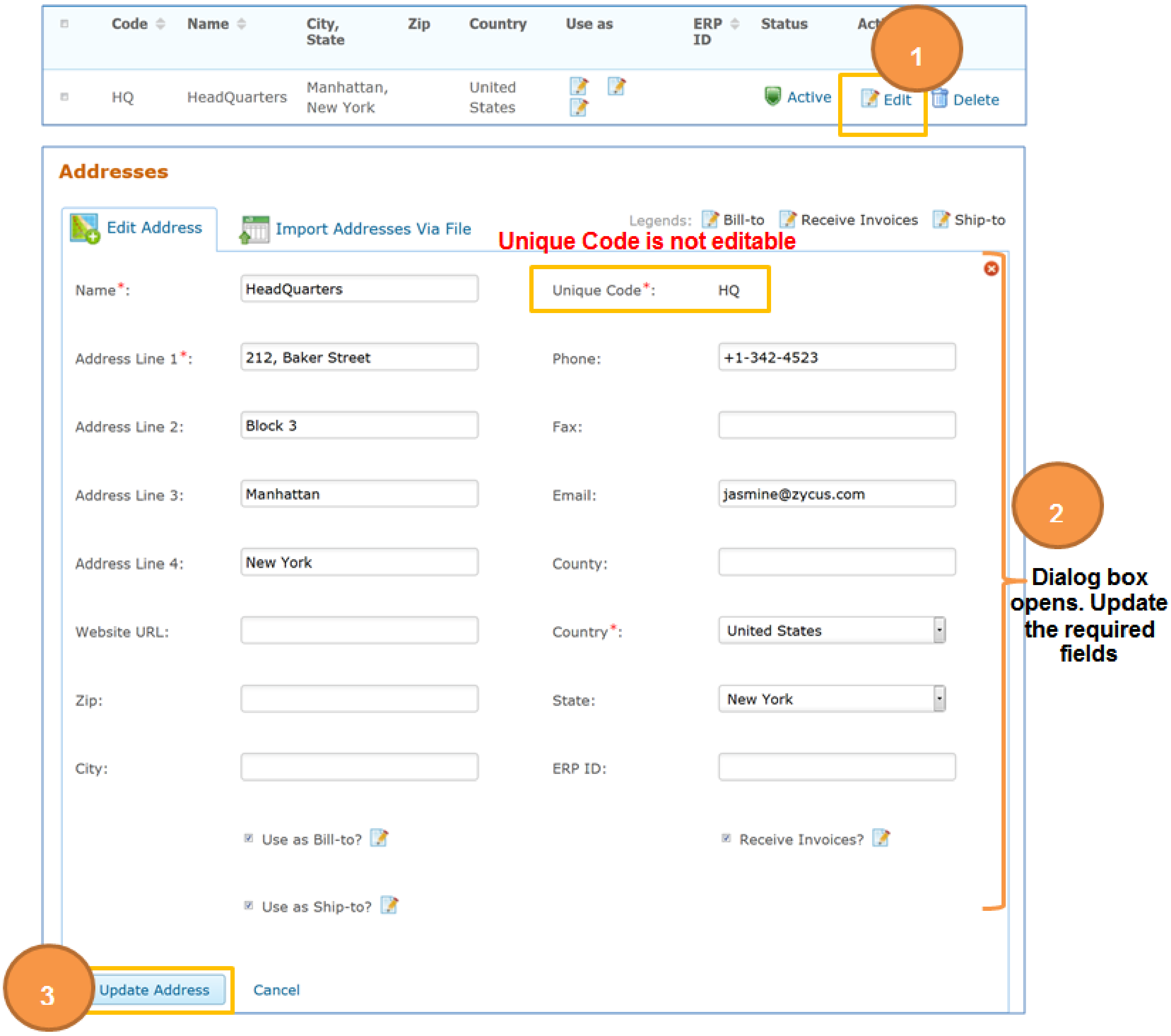
- **To activate/deactivate multiple addresses, use the checkbox.**
- **Use** 

- **To activate/deactivate individual address, use** 

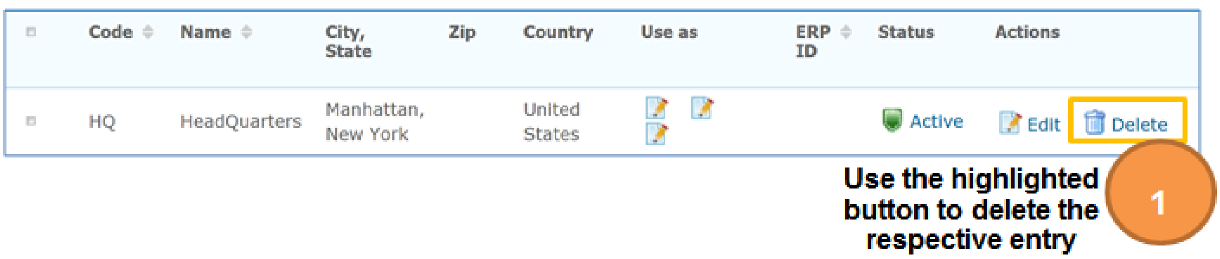
.

Reference: Follow the same steps as shown for How Do I Activate/Deactivate the Currencies Provided For My Products?

How to Edit an Address?

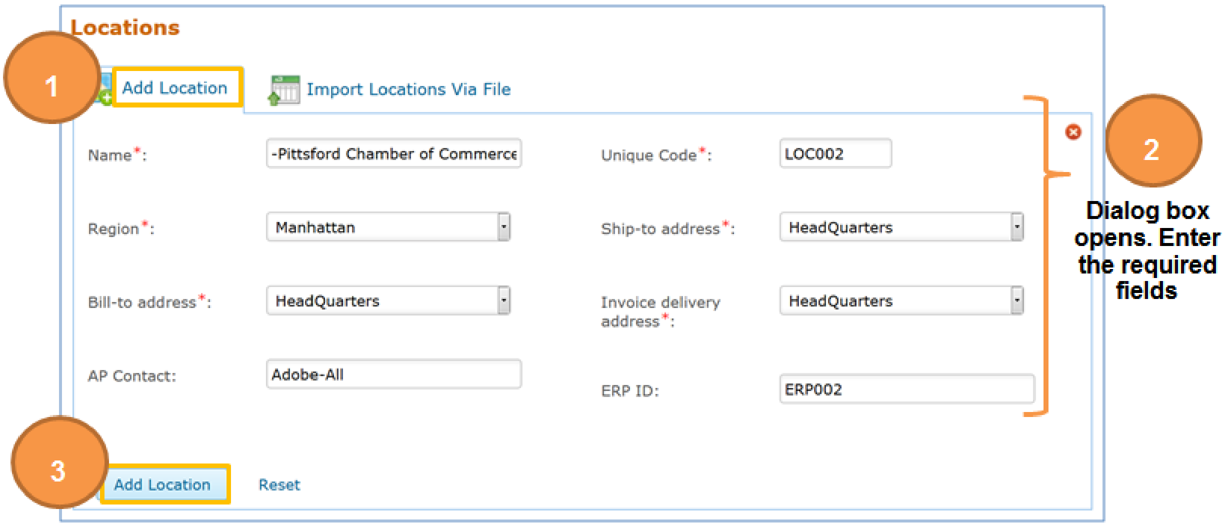


How to Delete an Address?



Location

How to Add Location?

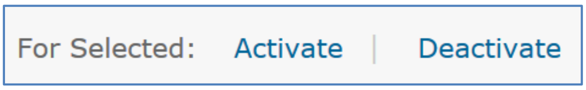


How to Bulk Upload Location?

Follow the same steps as shown for [How to Bulk Upload the Exchange Rates?]

How to Activate/Deactivate the Location?

Steps to activate or deactivate any master data are the same.

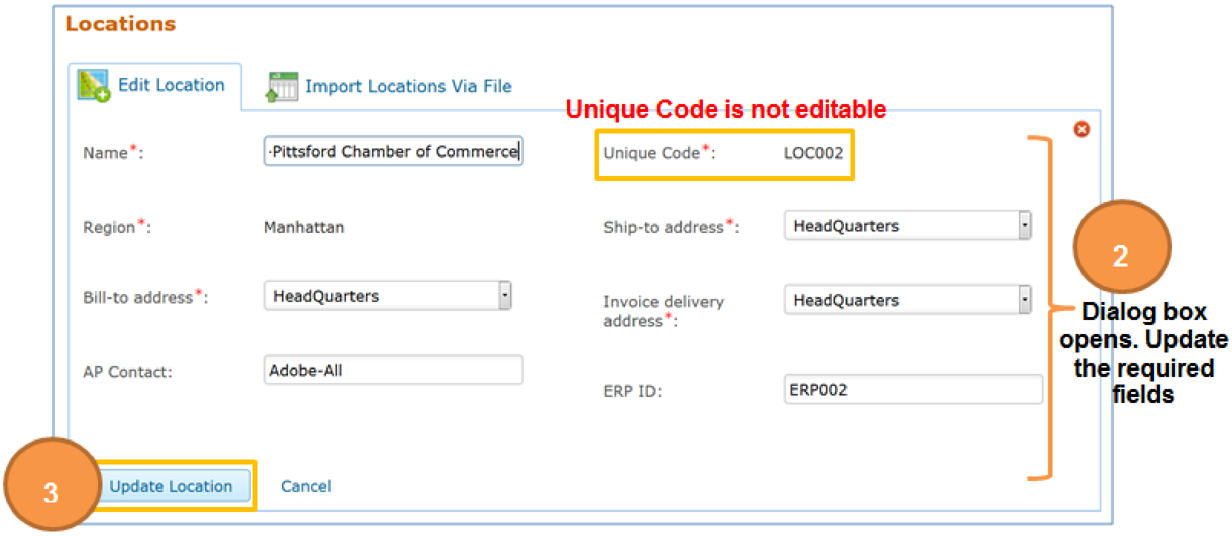
- **To activate/deactivate multiple locations, use the checkbox.**
- **Use** 

- **To activate/deactivate individual location, use** 

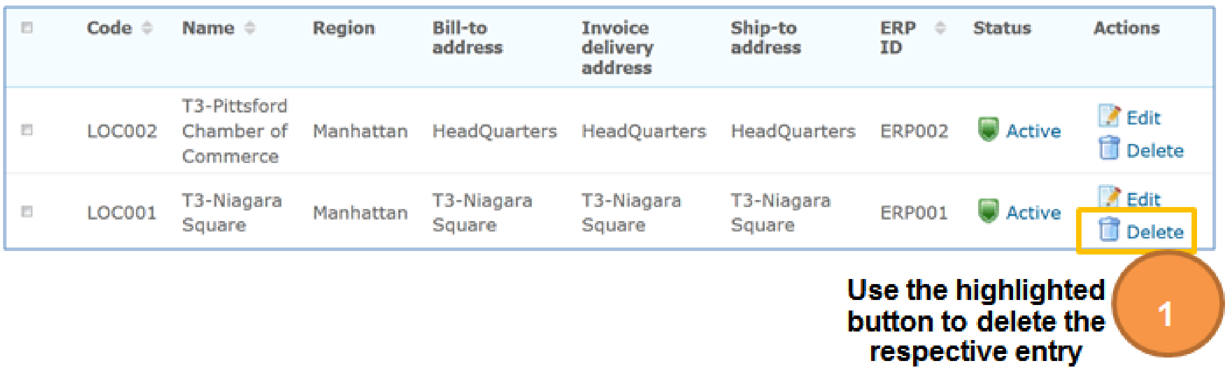
.

Reference: Follow the same steps as shown for [How Do I Activate/Deactivate the Currencies Provided For My Products?]

How to Edit a Location?

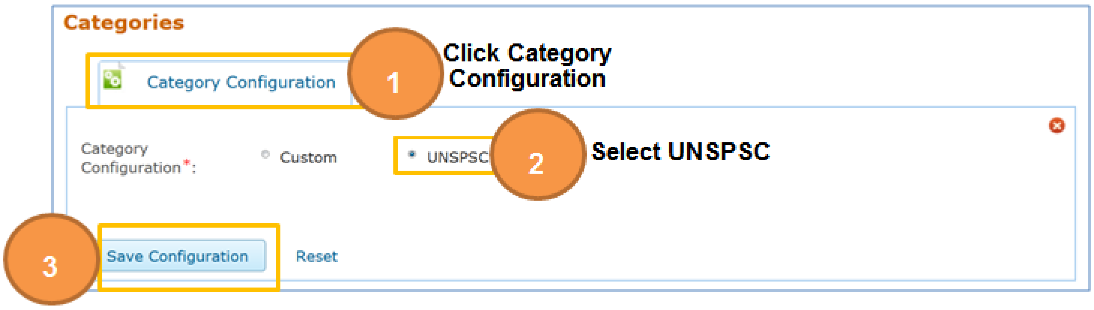


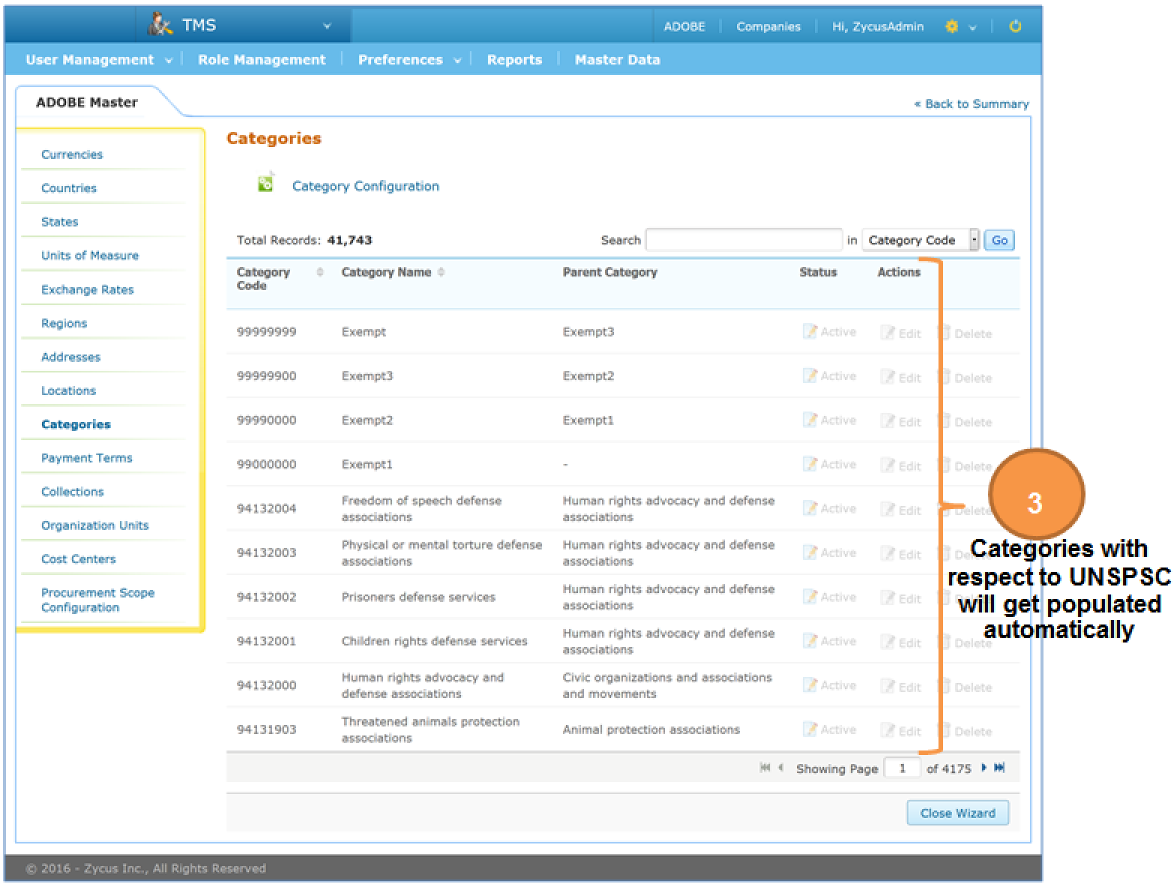
How to Delete a Location?



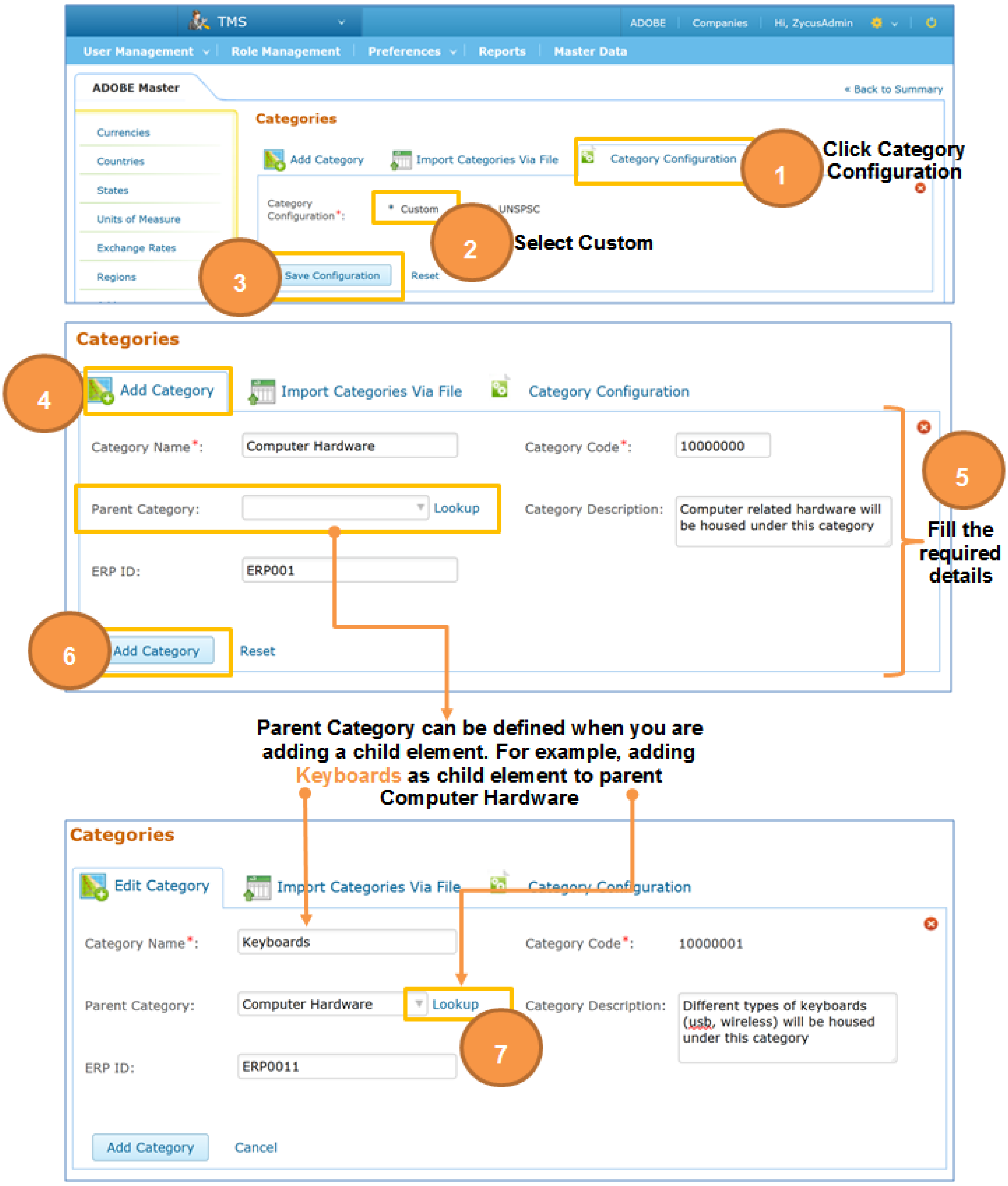
Categories

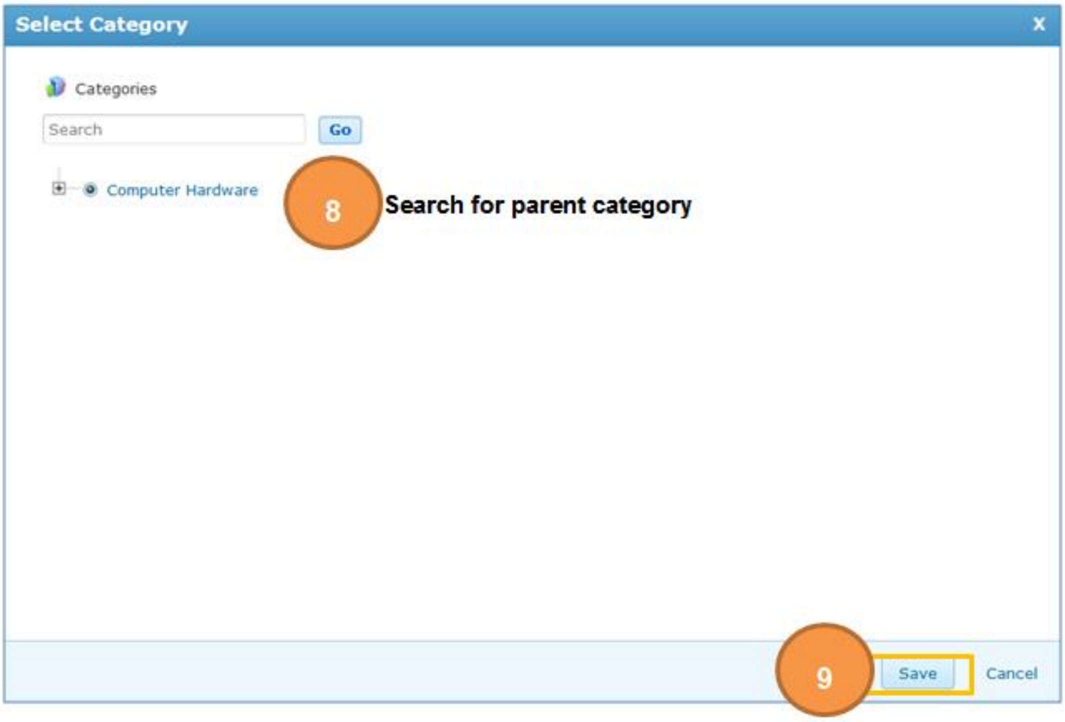
How to Configure UNSPSC Categories?

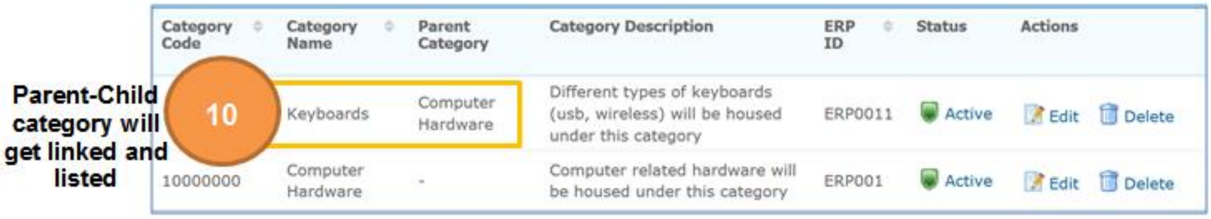




How to Configure Custom Categories?





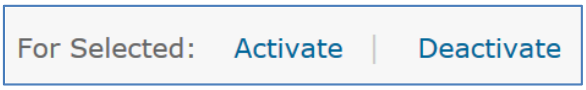


How to Bulk Upload Custom Category?

Follow the same steps as shown for [How to Bulk Upload the Exchange Rates?]

How to Activate/ Deactivate Custom Category?

Steps to activate or deactivate any master data are the same.

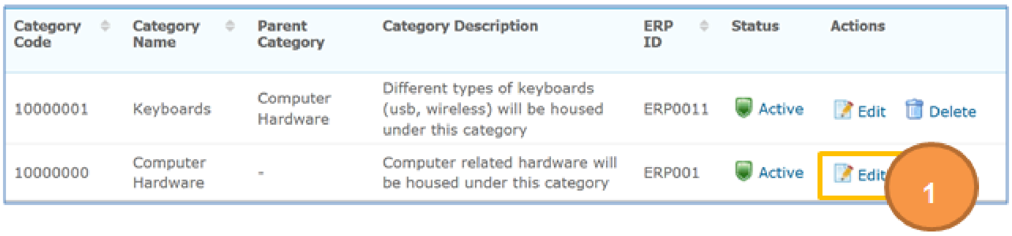
- **To activate/deactivate multiple custom categories, use the checkbox.**
- **Use** 

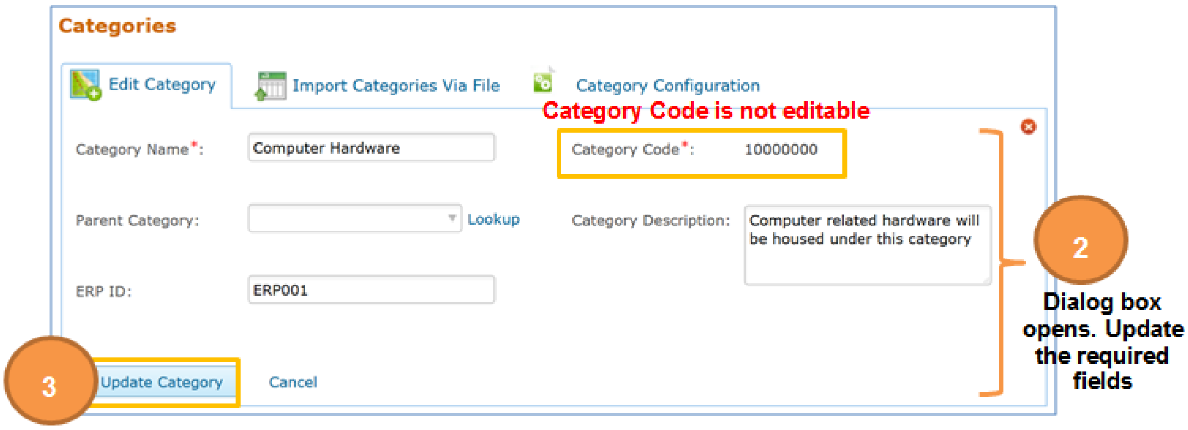
- **To activate/deactivate individual custom category, use** 

.

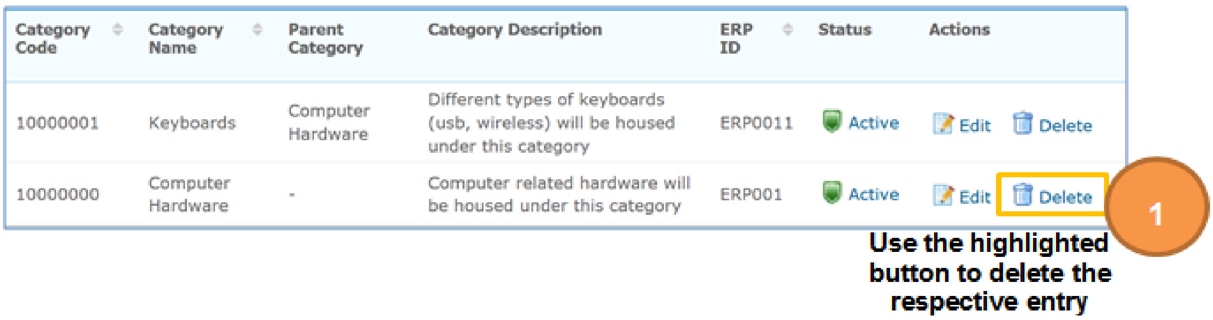
Reference: Follow the same steps as shown for [How Do I Activate/Deactivate the Currencies Provided For My Products?]

How to Edit a Custom Category?



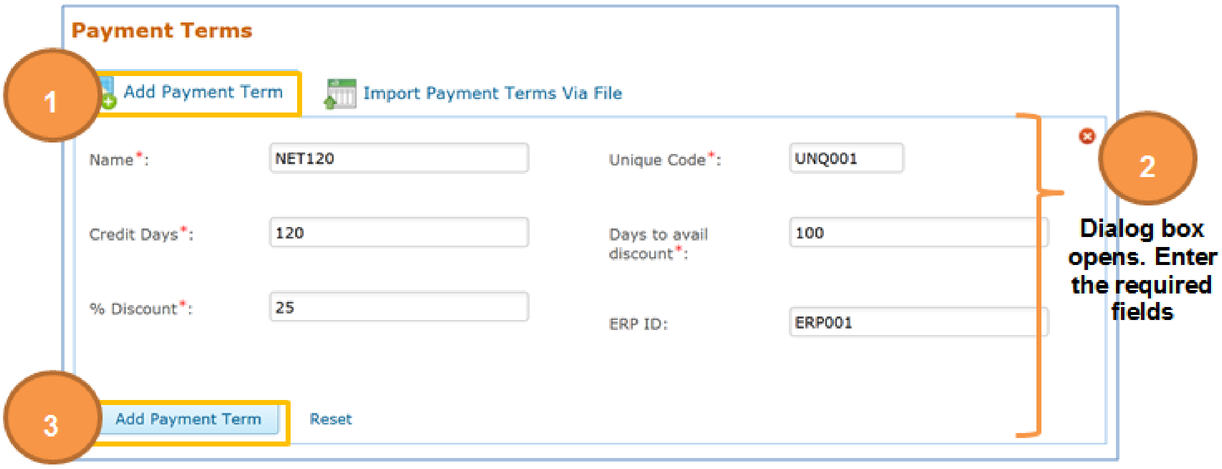


How to Delete a Custom Category?



Payment Terms

How to Add Payment Terms?

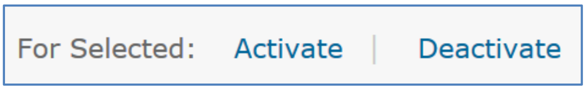


How to Bulk Upload the Payment Terms?

Follow the same steps as shown for [How to Bulk Upload the Exchange Rates?]

How to Activate/Deactivate the Payment Terms?

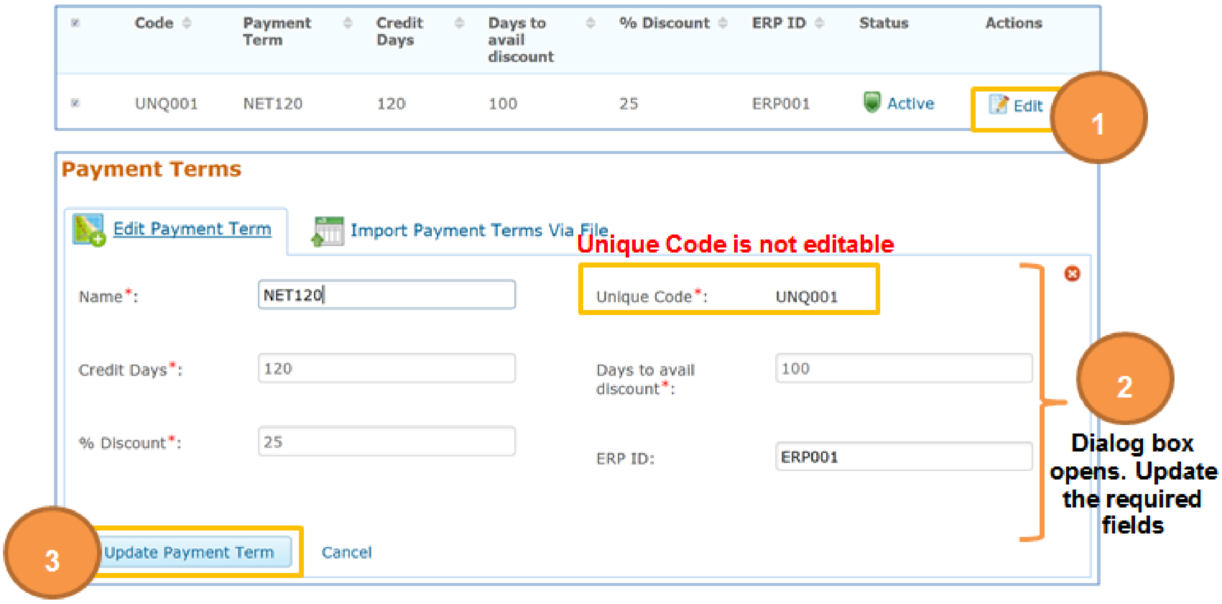
Steps to activate or deactivate any master data are the same.

- **To activate/deactivate multiple payment terms, use the checkbox.**
- **Use** 

- **To activate/deactivate individual payment term, use** 

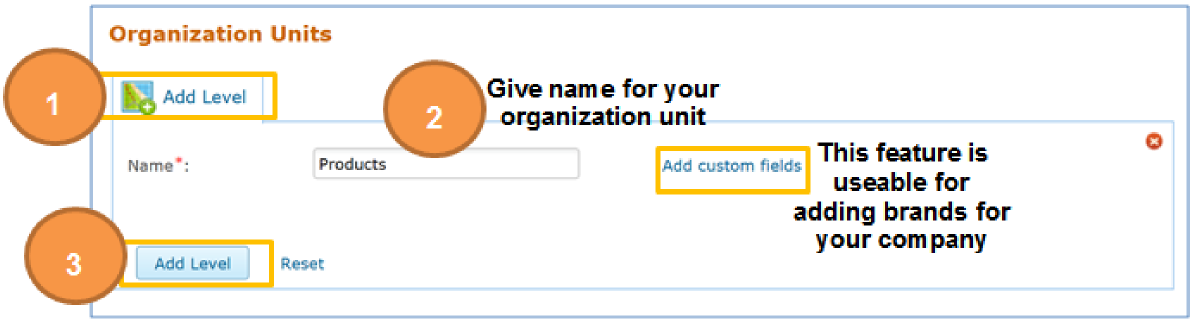
.

How to Edit a Payment Term?



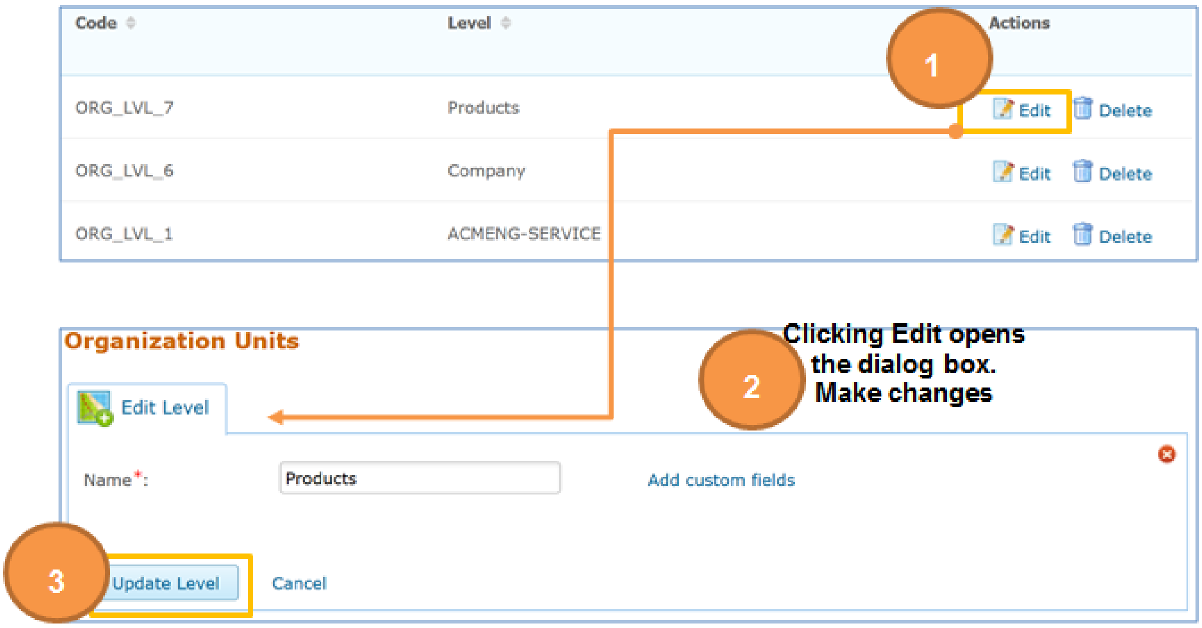
Organization Units

How to Add Organization Units?

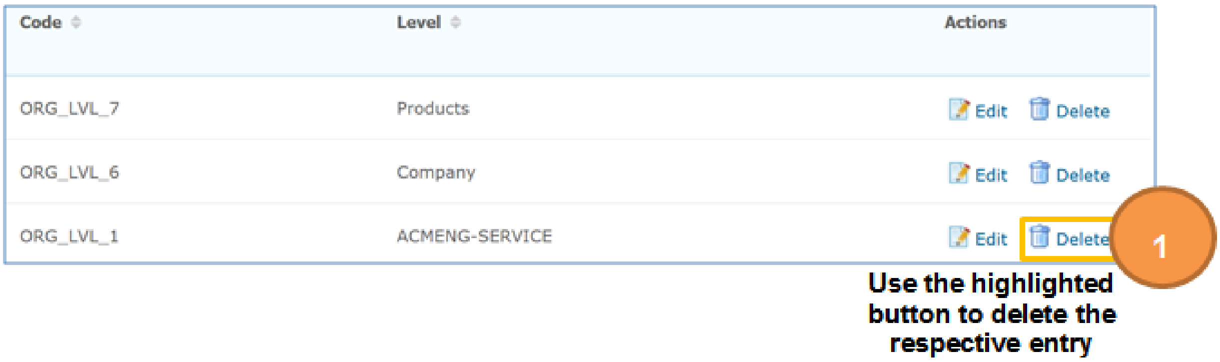


Once you add Organization Units, they are reflected as child entities under your organization. For example, take a look at the image below:

How to Edit Organization Unit?

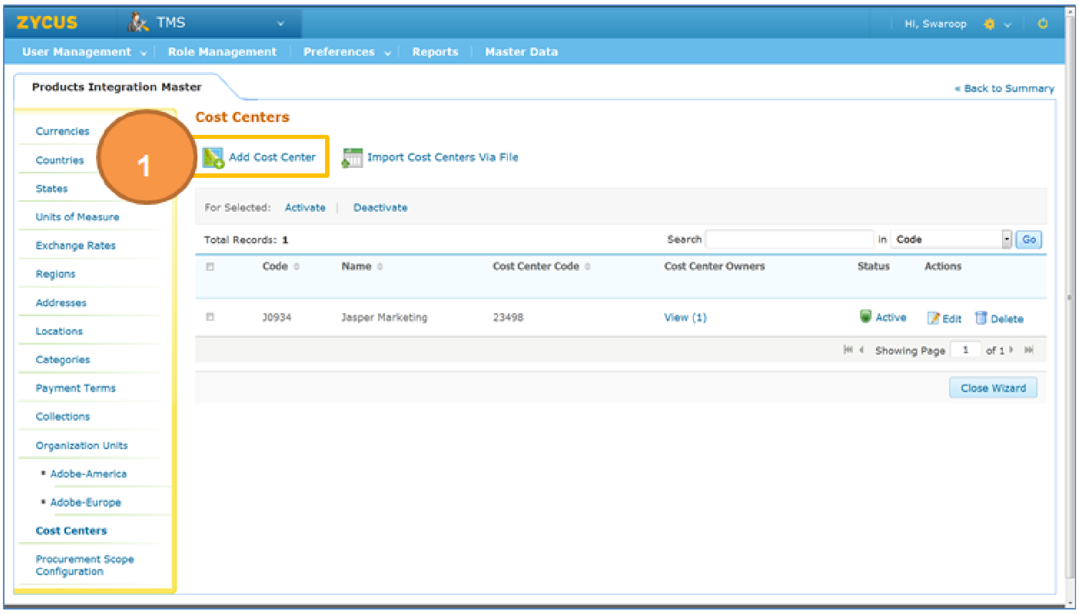


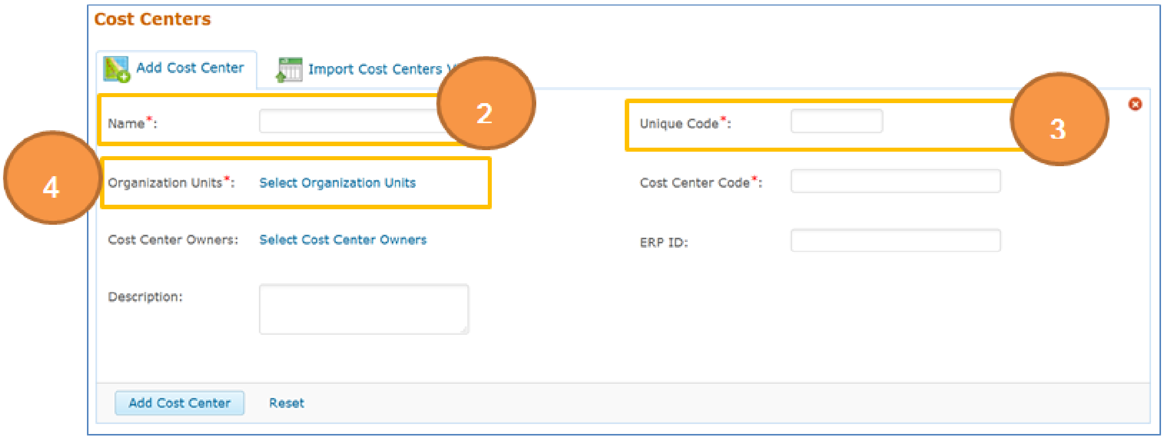
How to Delete Organization Unit?

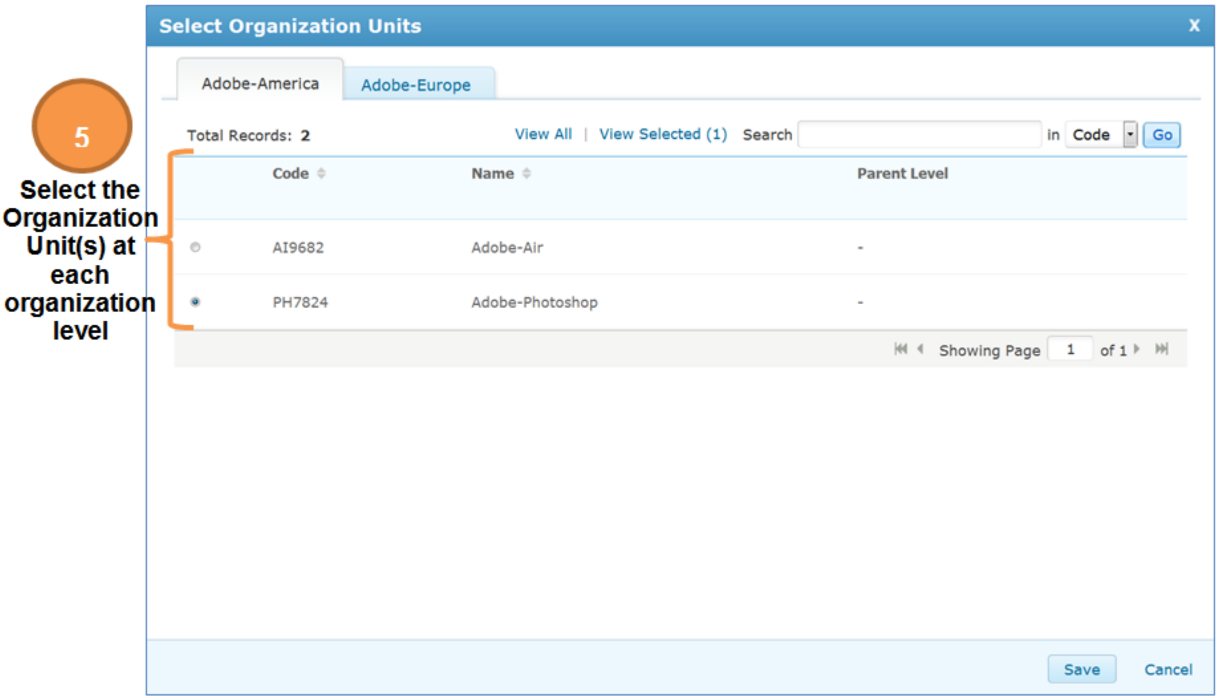


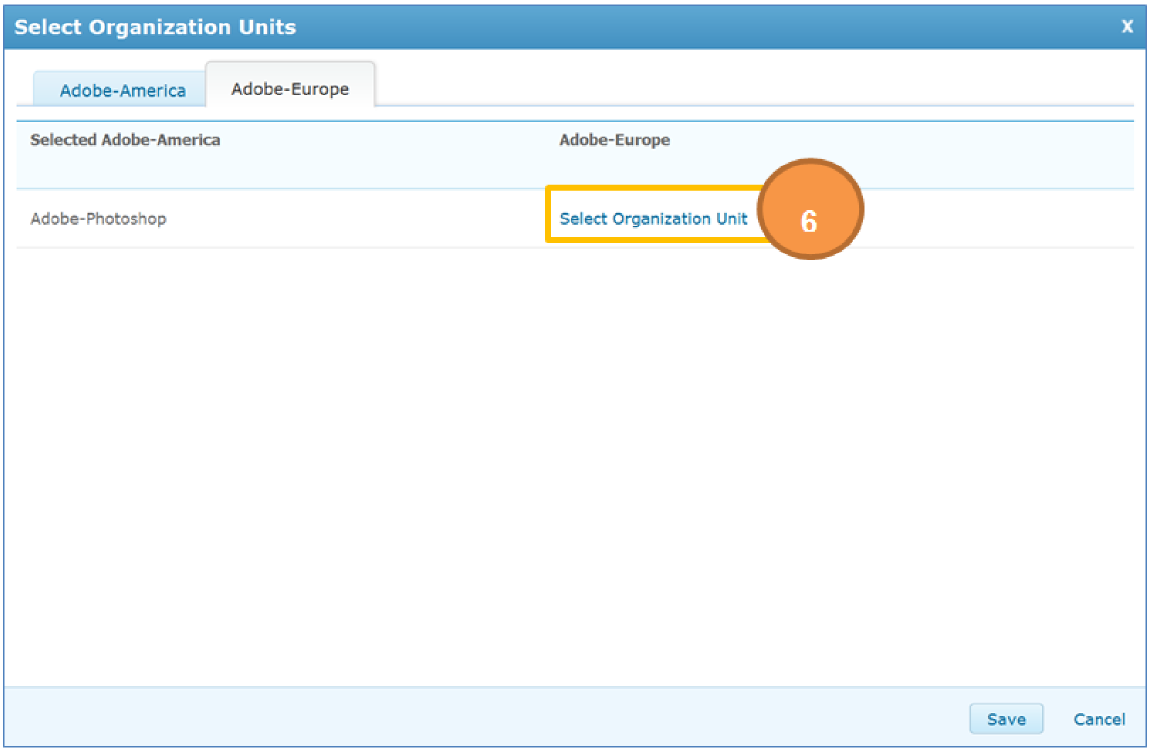
Cost Centers

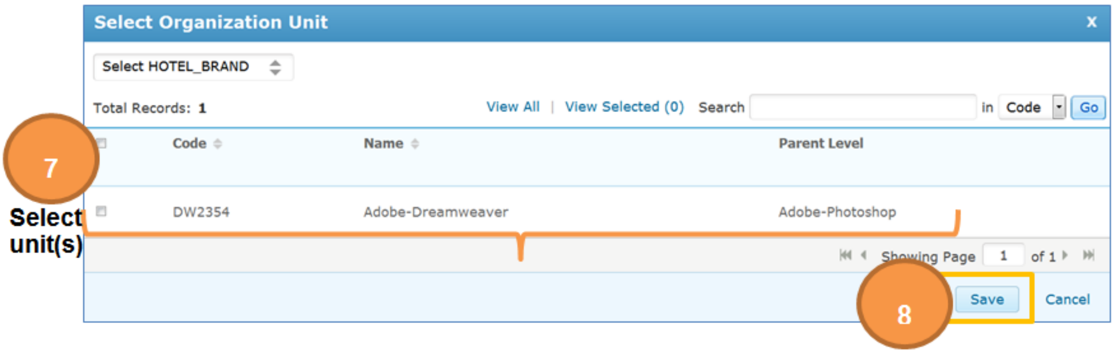
How to Add a Cost Center?

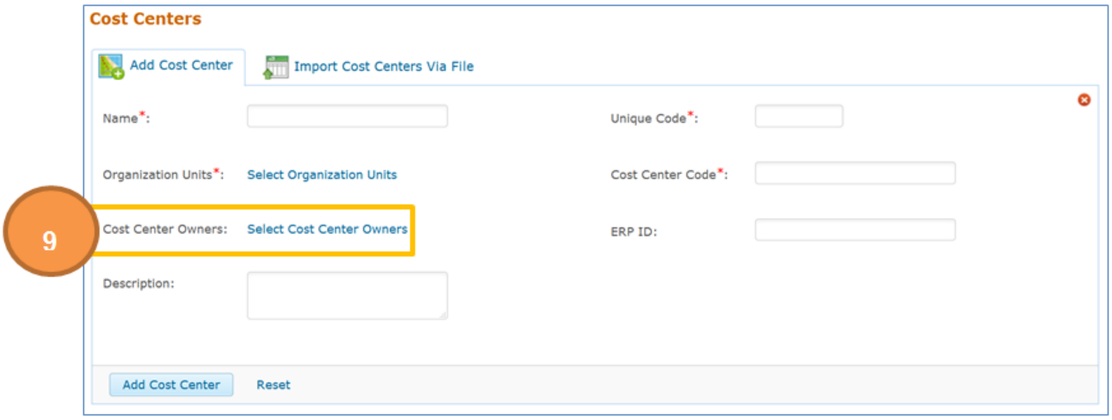


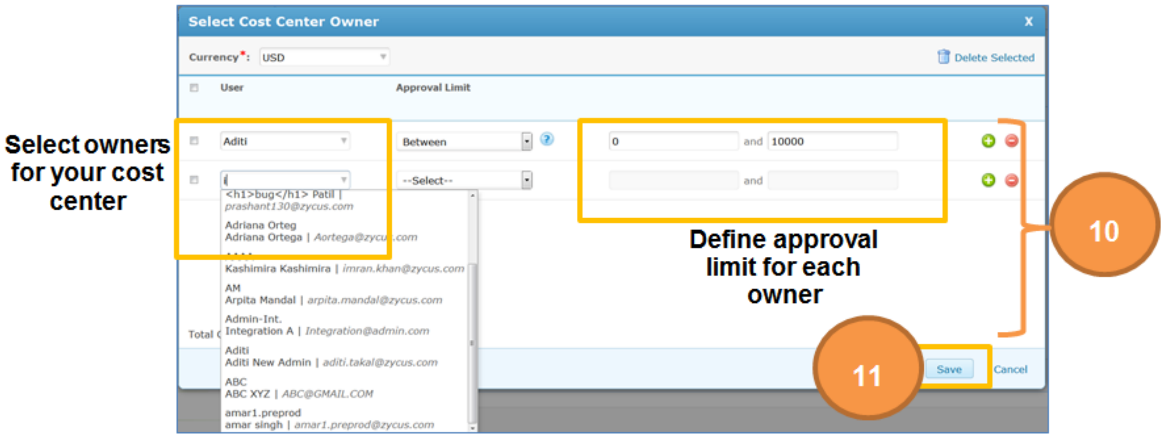



5
Select the Organization Unit(s) at each organization level
Select Organization Units
x
Adobe-America
Adobe-Europe
Total Records: 2
View All | View Selected (1)
Search
in Code
Go
Code
Name
Parent Level
AI9682
Adobe-Air
-
PH7824
Adobe-Photoshop
-
Showing Page 1 of 1
Save
Cancel


Select Organization Units
x
Adobe-America
Adobe-Europe
Selected Adobe-America
Adobe-Europe
Adobe-Photoshop
Select Organization Unit
6
Save
Cancel

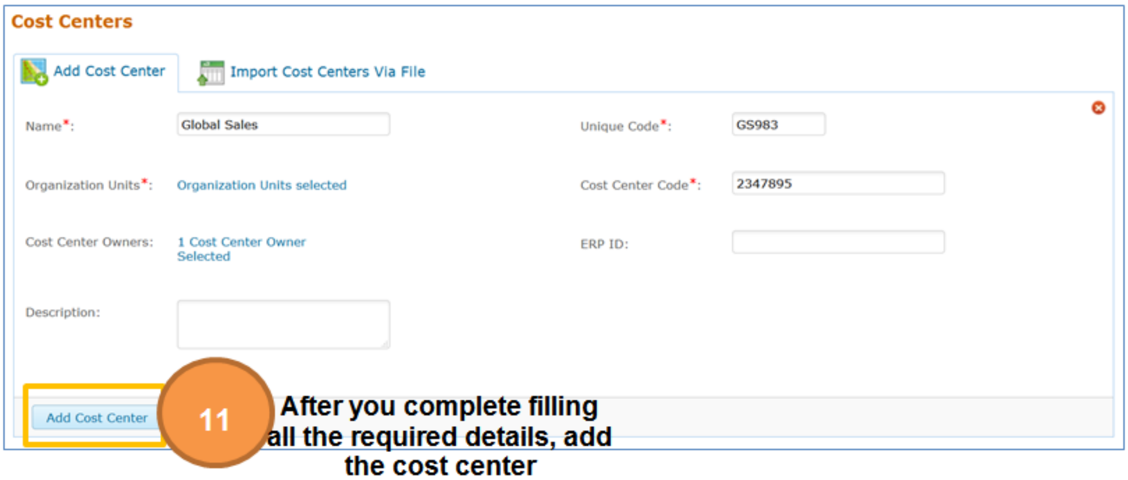






Note: *You can add more than one owner. The owners can be selected from your company members.*

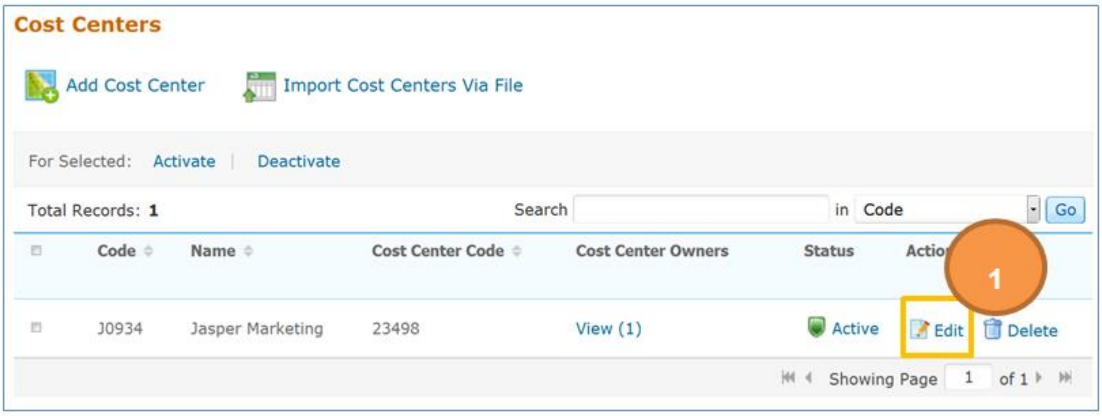
Note: *The approval limit for two or more owners cannot be overlapping.*

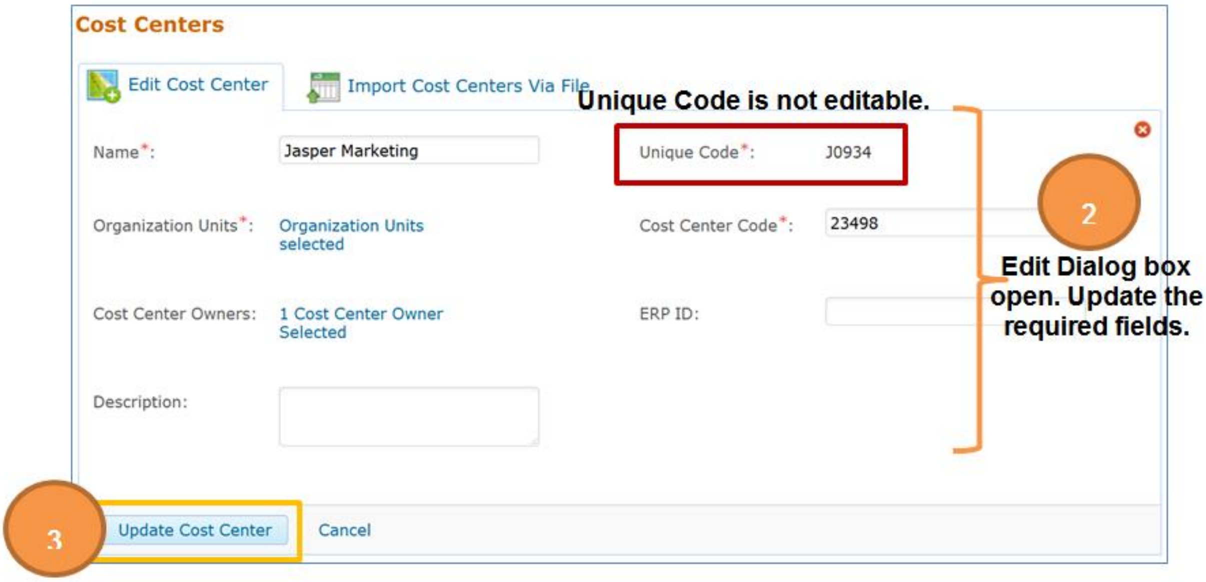


How to Bulk Upload Cost Centers?

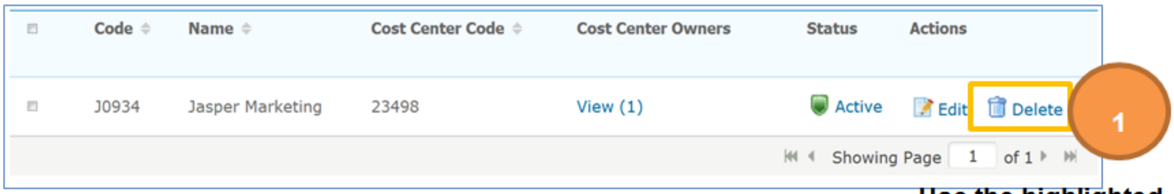
Follow the same steps as shown for [How to Bulk Upload the Exchange Rates?]

How to Edit a Cost Center?





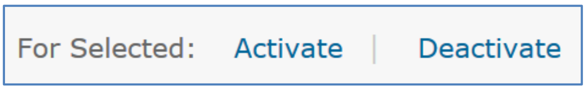
How to Delete a Cost Center?



Use the highlighted button to delete the respective entry

How to Activate/Deactivate the Cost Centers?

Steps to activate or deactivate any master data are the same.

- **To activate/deactivate multiple cost centers, use the checkbox.**
- **Use** 

- **To activate/deactivate individual cost center, use** 

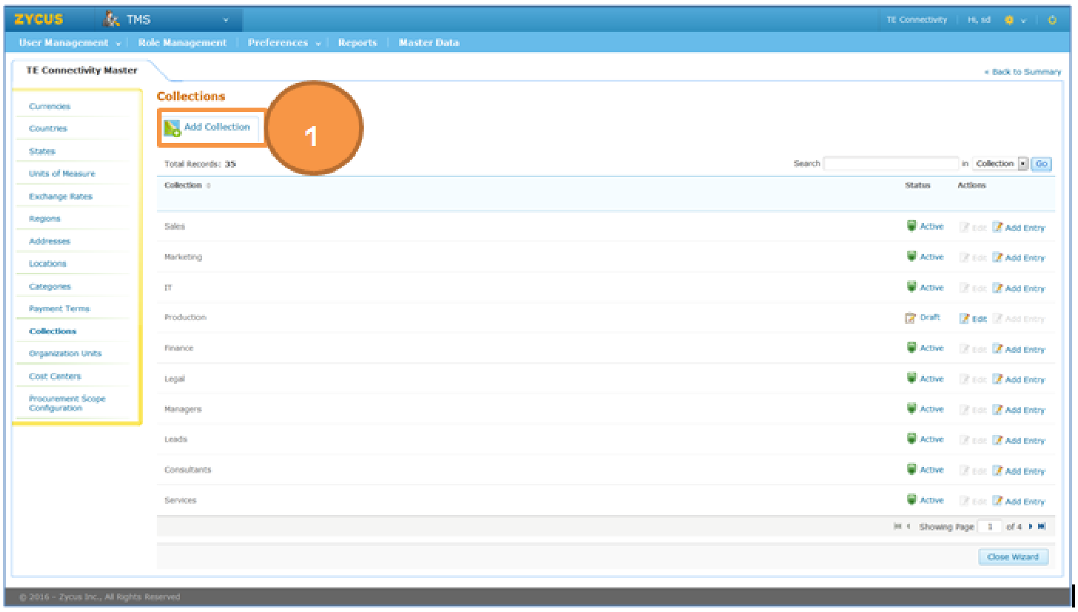
.

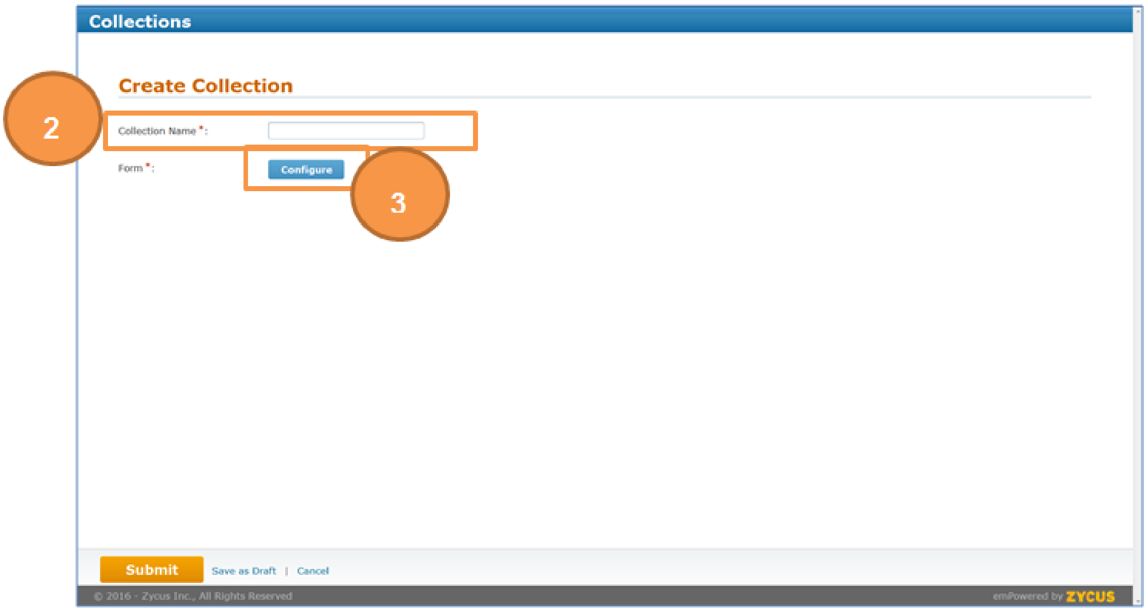
Reference: Follow the same steps as shown for How Do I Activate/Deactivate the Currencies Provided For My Products?

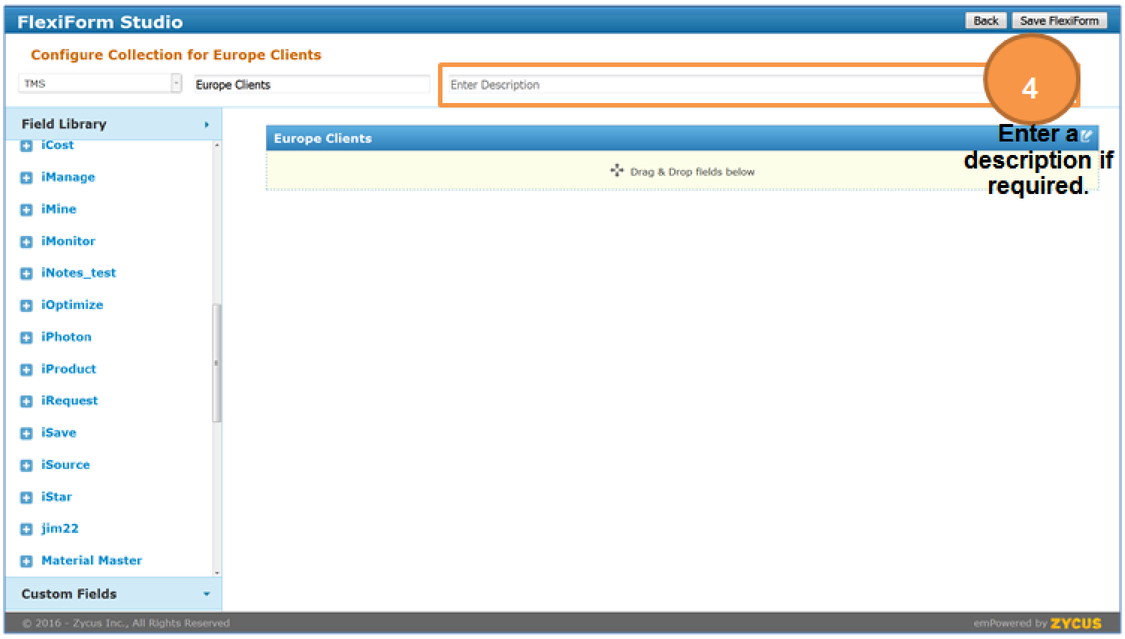
Collections

How to Add a Collection?

Given below is the collections listing page:






FlexiForm Studio
Back
Save FlexiForm
Configure Collection for Europe Clients
TMS
Europe Clients
Enter Description
4
Enter a description if required.
Field Library
iCost
iManage
iMine
iMonitor
iNotes_test
iOptimize
iPhoton
iProduct
iRequest
iSave
iSource
iStar
jim22
Material Master
Custom Fields
Europe Clients
Drag & Drop fields below
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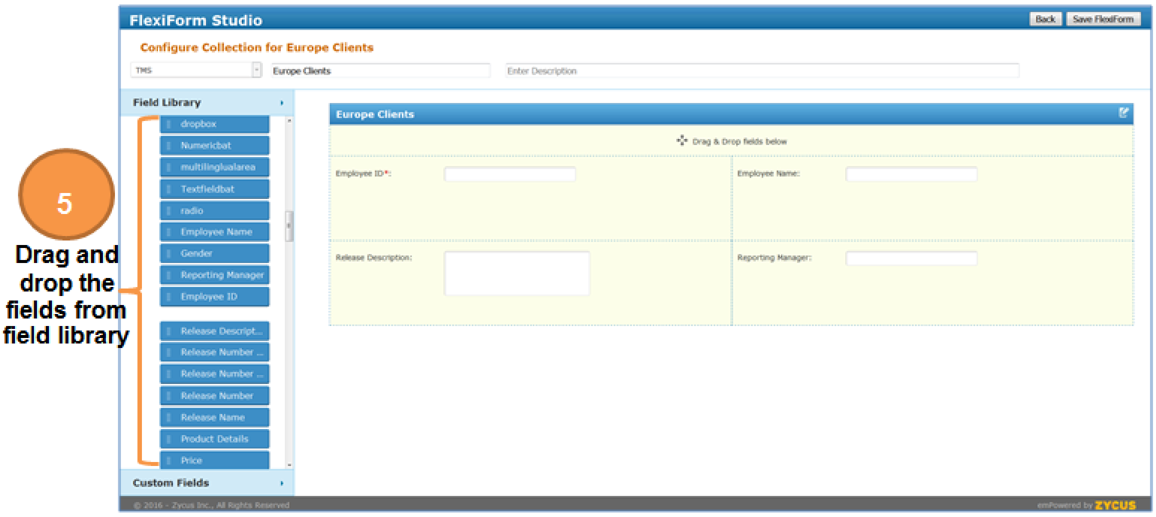
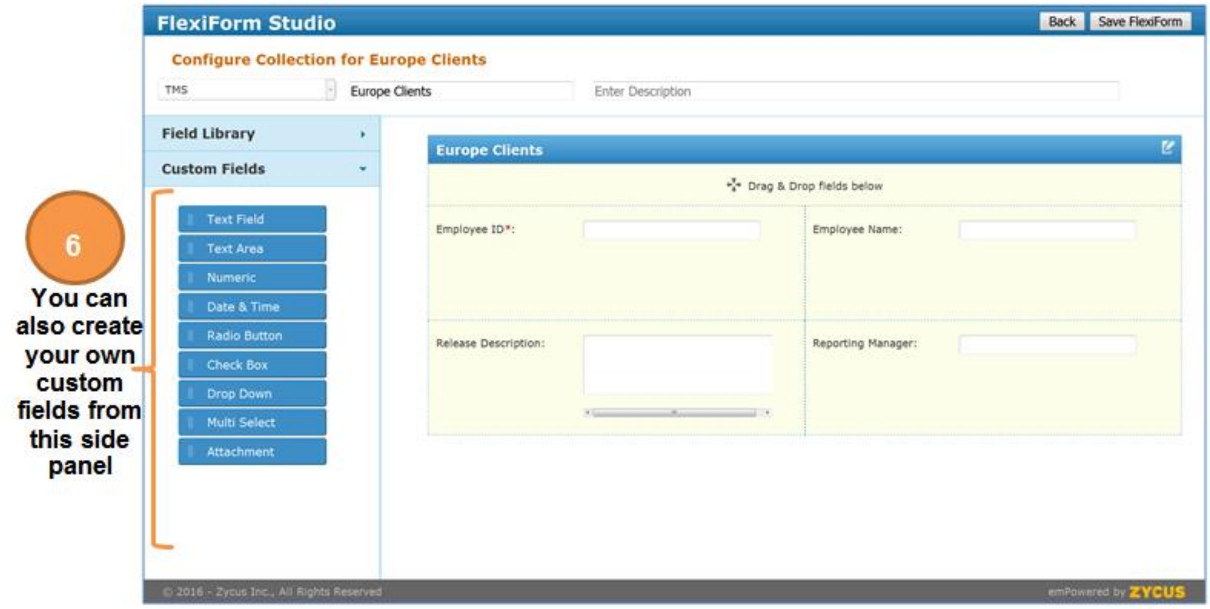
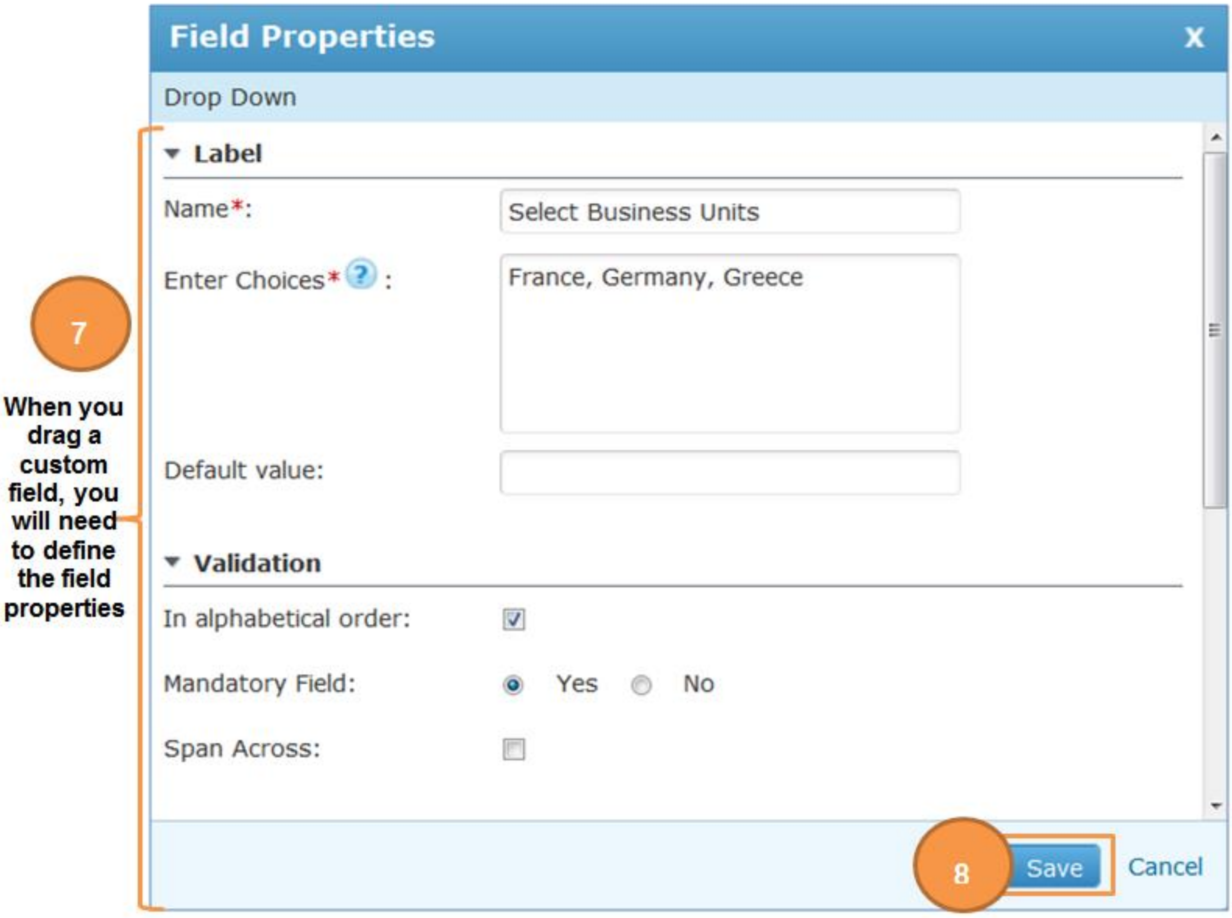
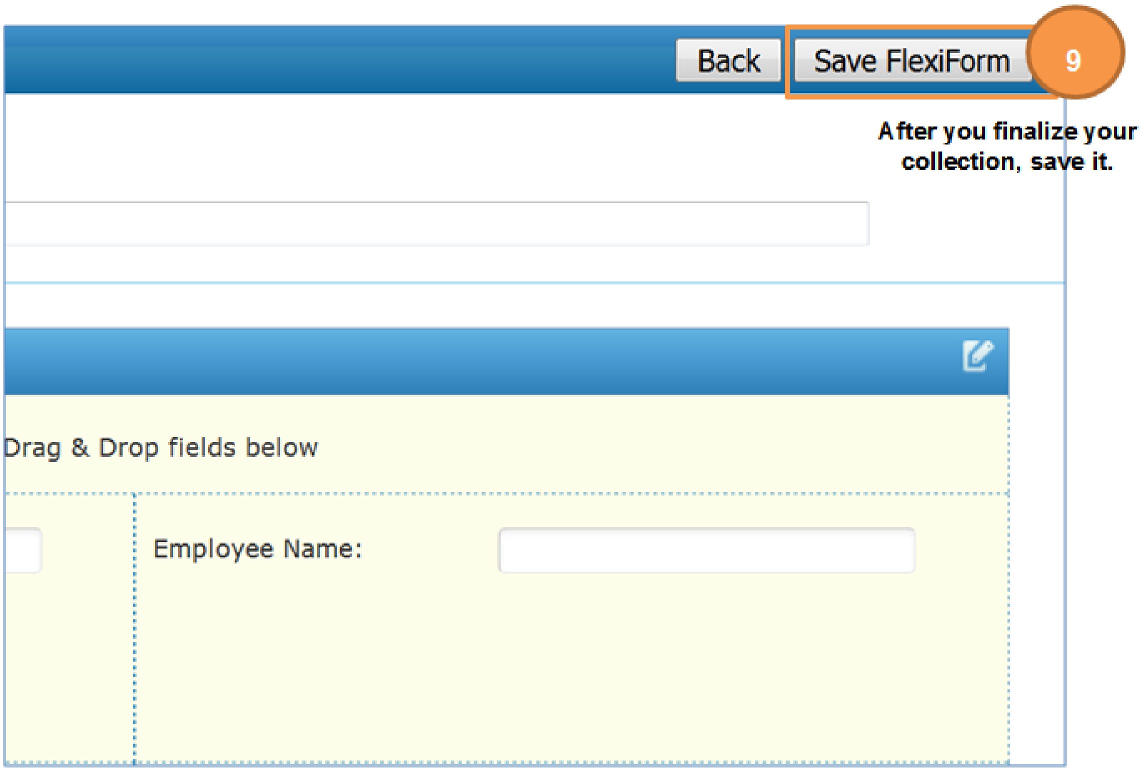
emPowered by ZYCUS

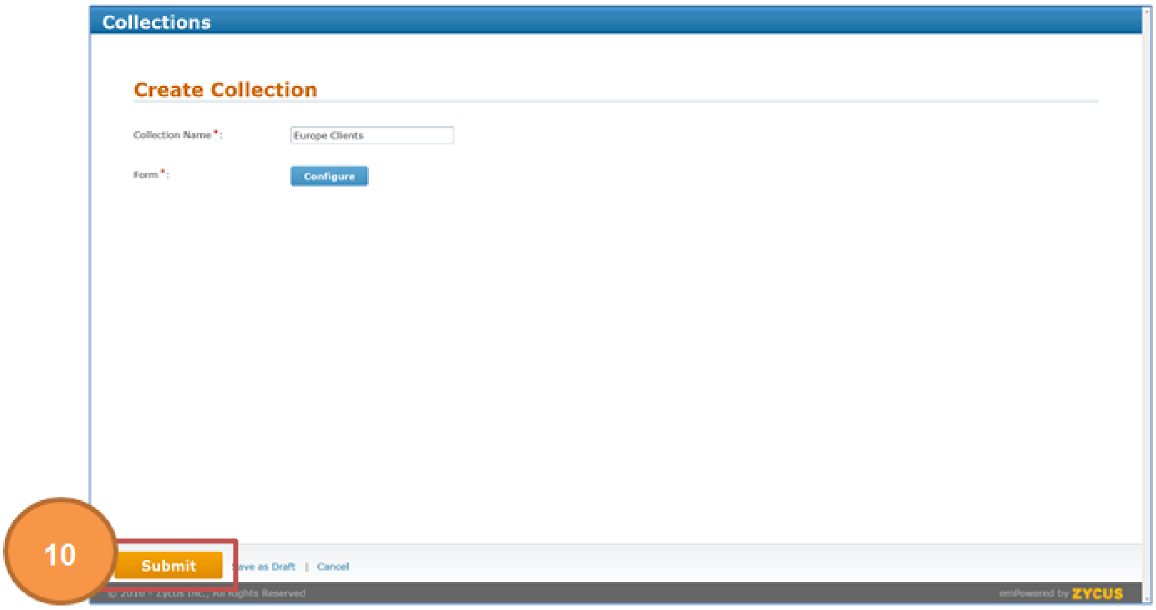

5
Drag and drop the fields from field library
FlexiForm Studio
Back
Save FlexiForm
Configure Collection for Europe Clients
TMS
Europe Clients
Enter Description
Field Library
dropbox
Numericbat
multilinglualarea
Textfieldbat
radio
Employee Name
Gender
Reporting Manager
Employee ID
Release Descript...
Release Number ...
Release Number ...
Release Number
Release Name
Product Details
Price
Custom Fields
Europe Clients
Drag & Drop fields below
Employee ID*:
Employee Name:
Release Description:
Reporting Manager:

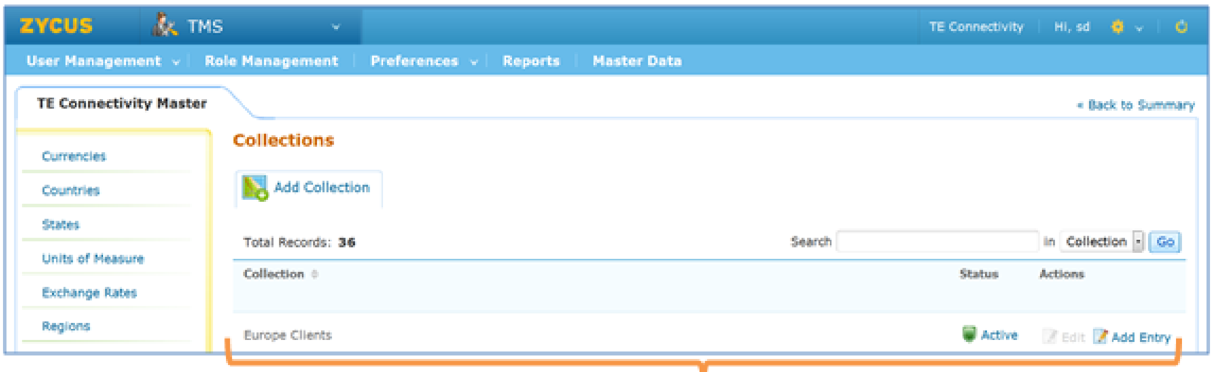




Note: Field Types like Checkbox, Date & Time, Multi Select, Attachments are not allowed while creating collections

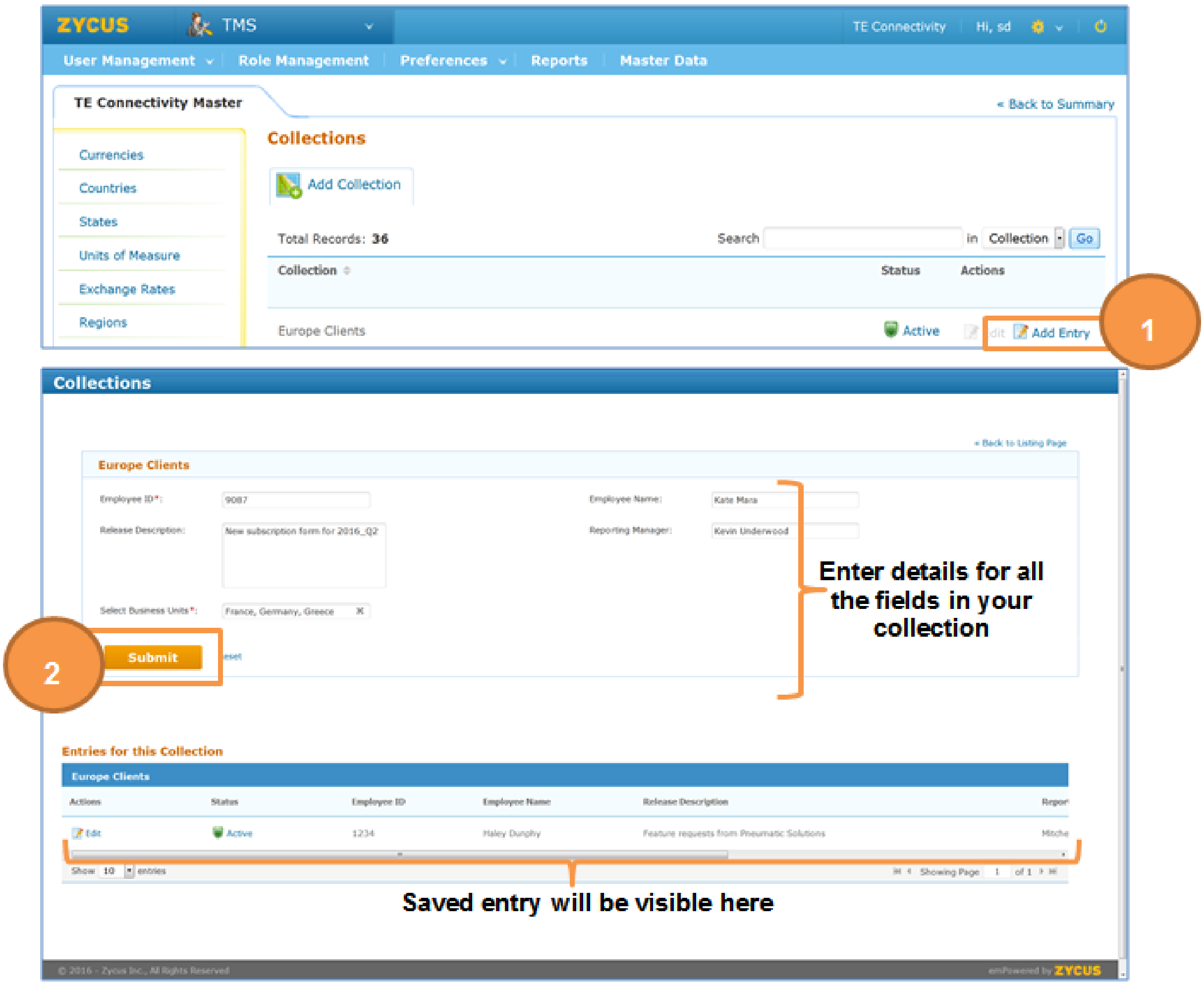

Back
Save FlexiForm
9
After you finalize your collection, save it.
Drag & Drop fields below
Employee Name:


Collections
Create Collection
Collection Name *:
Europe Clients
Form *:
Configure
10
Submit
Cancel
ZYCUS



Newly added collection will be visible on the listings page.

How to Add an Entry in Collection?



How to Deactivate a Collection?

Steps to activate or deactivate any master data are the same.

- **To activate/deactivate individual collection, use** 

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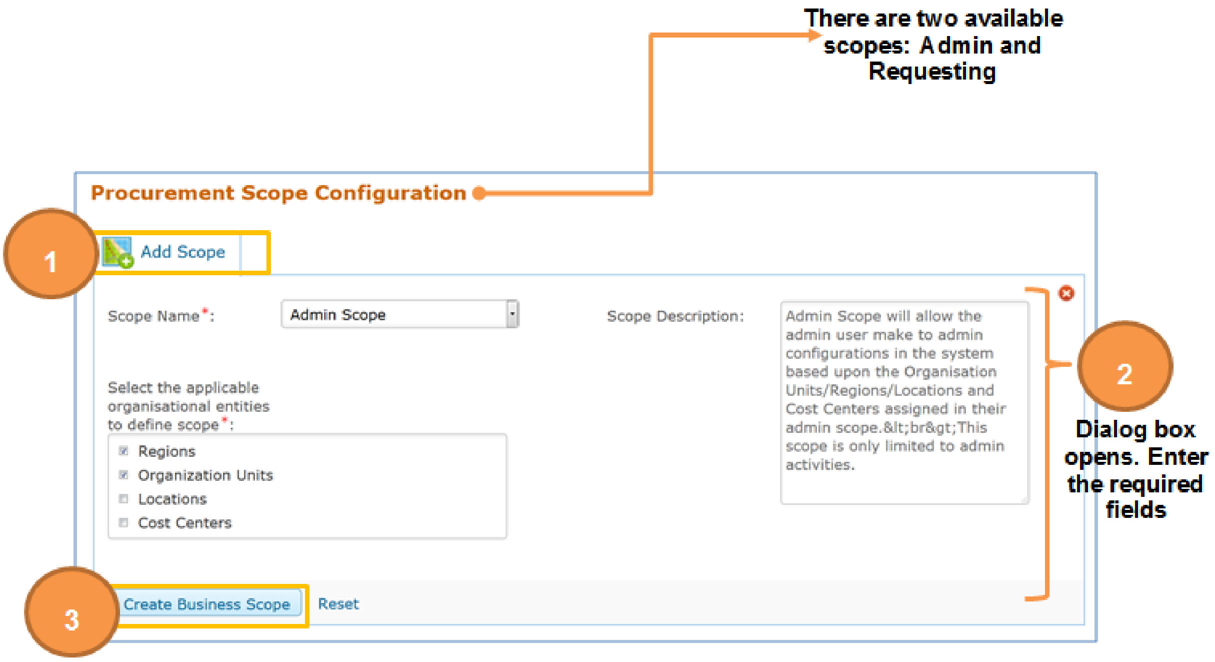
Procurement Scope Configuration

How to Add Procurement Scope?



How to Edit Procurement Scope?