



Tenant Management System (TMS)

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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 switched 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

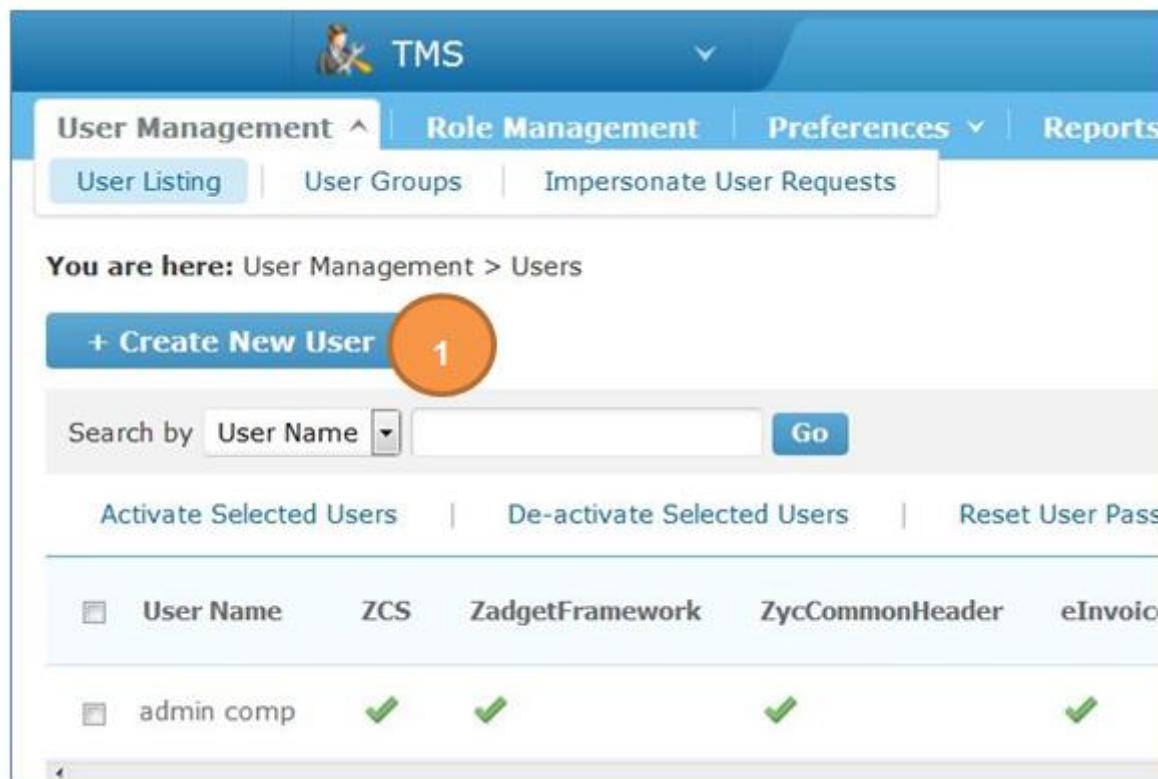
TMS access is provided to those users who have company authorized rights to manage user profiles, user roles, user activities, and general level product settings.

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.

User Name	ZCS	ZadgetFramework	ZycCommonHeader	eInvoice	eProc	eProcurement	iAnalyze	iConsole	iContract	iCost	iManage	iMaster	User Status	Account Status	Action
admin comp	<input checked="" type="checkbox"/> Active														

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Steps to Create a New User:

The screenshot shows the TMS User Management interface. At the top, there is a navigation bar with tabs: User Management (selected), Role Management, Preferences, and Reports. Below the navigation bar, there are three buttons: User Listing, User Groups, and Impersonate User Requests. A message "You are here: User Management > Users" is displayed. In the center, there is a large blue button labeled "+ Create New User" with a red circle containing the number "1" over it. Below this button is a search bar with the placeholder "Search by User Name" and a "Go" button. Underneath the search bar are three buttons: "Activate Selected Users", "De-activate Selected Users", and "Reset User Pass". The main content area displays a table with columns: User Name, ZCS, ZadgetFramework, ZycCommonHeader, and eInvoice. One row is visible, showing "admin comp" in the User Name column and checkmarks in all other columns.

User Name	ZCS	ZadgetFramework	ZycCommonHeader	eInvoice
admin comp	✓	✓	✓	✓

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

2 Continue > | Cancel



Enter all the required information.

Step 2 - Product Allocation for Claire

Assign product and product specific roles to user

Product Name	Actions
Dashboard	Unassign
Notification	Unassign
TMS	Assign
iSupplier	Unassign
iContract	Unassign
iSource	Unassign

Assign products to the user.

Back | Continue » | Cancel

3

Step 3 - Assign Roles to Claire (Allocate appropriate roles to the user)

Role Name	Global/Product
Autox_Global_Role	Global
Buyer_R13_01	Global
CMD zycus admin	Global
coc_admin_1	Global
COMPANY ADMIN	Global
Company Dashboard Admin	Dashboard
Contract Administrator	iContract
Contract Analyst	iContract
Contract Author	iContract
Contract Manager	iContract

Assign Roles to the User

View All | View Selected (5)

Back | Continue » | Cancel

4

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

New User in Company PIXEL

Step 4 - Assign Scope to Joel (Allocate appropriate scopes to the user)

Scope Name	Scope Type
Pixel Admin Scope 01	ADMIN_SCOPE
Pixel Admin Scope 02	ADMIN_SCOPE
<input checked="" type="checkbox"/> Pixel Admin Scope 03	ADMIN_SCOPE
<input checked="" type="checkbox"/> Pixel Requesting Scope 01	REQUESTING_SCOPE
<input type="checkbox"/> Pixel Requesting Scope 02	REQUESTING_SCOPE

Check the boxes against the scope name you want to assign to the user

Back | Continue » | Cancel

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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.

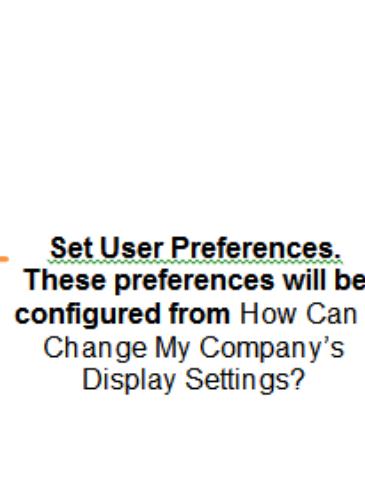
New User in Company 'ADOBE'

Step 4 - Preferences for Claire (Manage user specific preferences below)

User Information:

Time Zone:	America/New_York - (GMT-5:00)
Number Format:	#,###,###,##0
Date Format:	MM/dd/yyyy
Time Format:	12 Hours
Currency:	US Dollar
Locale:	English (US)
Decimal Precision:	0
IP Sources:	(Empty Text Area)

Back | Continue > | Cancel



5

User Information Preview for Claire

Please Verify the User information below before defining the User for the company

Basic Details

User Information	Reporting Manager
Ms Claire Durphy, claire.durphy@zycus.com	Aziz Shamm, aziz.adobe@zyous.com

Product Allocation

Products	Edit
Dashboard	Edit
Notification	Edit
Usage Tracker	Edit
iContract	Edit
testproduct	Edit

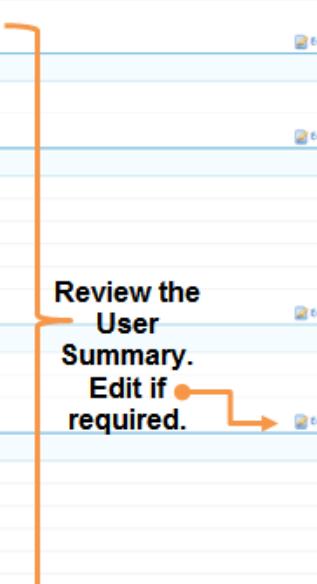
Roles

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	#,###,###,##0
Date Format	MM/dd/yyyy
Time Format	12 Hours
Currency	USD
Locale	English (United States)

Define User | Cancel



6

You are here: User Management > Users

+ Create New User

Search by User Name Go

Activate Selected Users | De-activate Selected Users | Reset User Passwords | Upload Users

User Name	Email ID	Manager Email ID	Dashboard	Notification	iSource	Usag	User Status	Account Status	Action
Aziz Shamim	aziz.adobe@zycus.com	-	✓	✓	✓	✓	Active	Unlocked	
Claire Dunphy	claire.dunphy@zycus.com	aziz.adobe@zycus.com	✓	✓	✗	✓	Active	Unlocked	

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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.

You are here: User Management > User Groups

+ Create New Group User Groups

Group Name	Description	Created On	Users	Status	Actions
No Records Found.					

Page 1 of 1

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Steps to create a new group:

The screenshot shows the TMS User Management interface. At the top, there are tabs for User Management, Role Management, Preferences, Reports, and Master Data. Under User Management, there are sub-tabs for User Listing, User Groups (which is selected), and Impersonate User Requests. The main content area displays a table for User Groups, with a single row labeled "No Records Found". A yellow box highlights the "+ Create New Group" button, which is circled with a large orange circle labeled "1". Below this, the "New Group" dialog box is open. It contains fields for "Group Name" (set to "HR") and "Description" (set to "HR related activities will be handled by this group"). A note indicates that the asterisk (*) denotes a mandatory field. On the right side of the dialog, there is a list of users: Aziz Shamim and Claire Dunphy. A callout bubble points to this list with the text "Enter all the required information." A second orange circle labeled "2" is located at the bottom left of the dialog.

You are here: User Management > User Groups

+ Create New Group User Groups

Group Name	Description	Created On	Users	Status	Actions
HR	HR related activities will be handled by this group	2016/04/18	2	Active	

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New User Group will be listed on this page.

By default the status of newly created group will be active.

Use Actions dropdown to Modify or Deactivate a group.

Actions ▾

- Modify
- Deactivate

How to Bulk Upload Users?

You are here: User Management > Users

+ Create New User

Search by User Name Go

Activate Selected Users | De-activate Selected Users | Reset User Status

2 Record(s) Found.

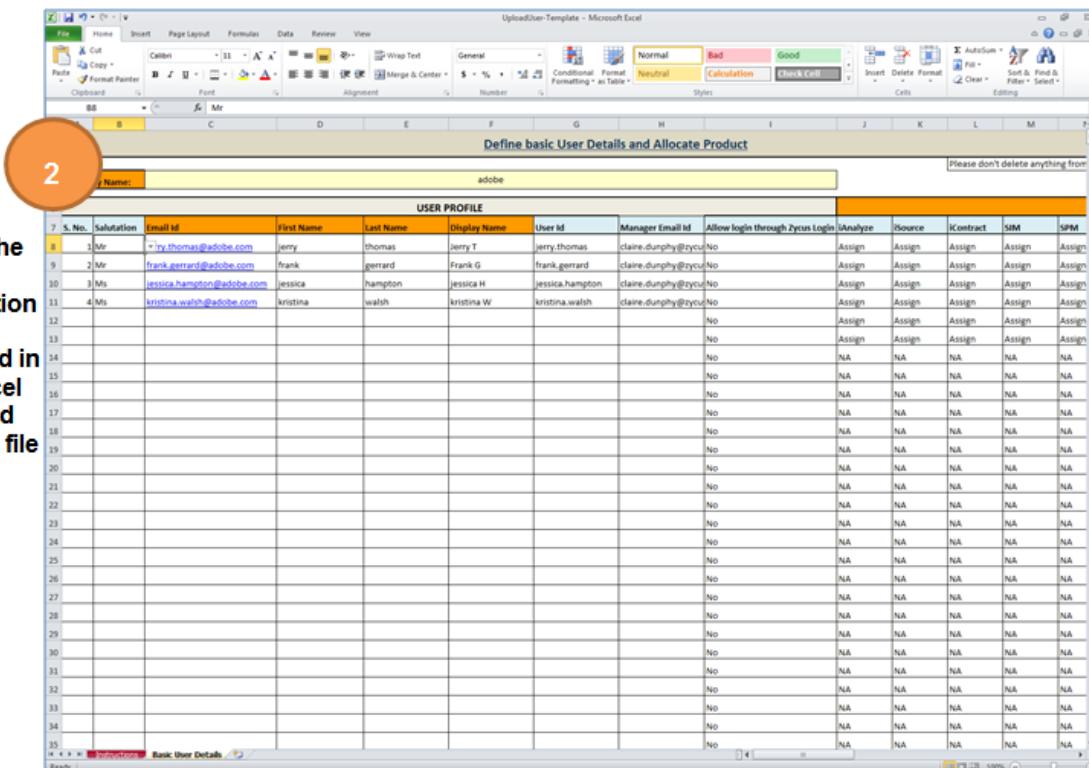
Create Users through Bulk Upload: No file selected.

1 Download Excel Template

User Name	Email ID	Manager Email ID	Date Created	Active	Unlocked	Action
Aziz Shamim	aziz.adobe@zycus.com	-	✓	✓	✓	
Claire Dunphy	claire.dunphy@zycus.com	aziz.adobe@zycus.com	✓	✓	✗	

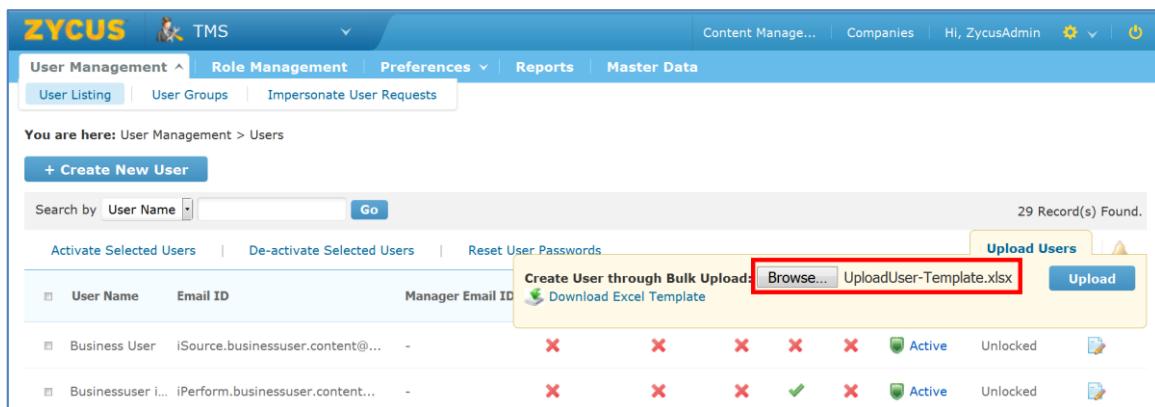
Page 1 of 1

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



Define basic User Details and Allocate Product													
(Please don't delete anything from this sheet)													
USER PROFILE													
S. No.	Salutation	Email Id	First Name	Last Name	Display Name	User Id	Manager Email Id	Allow login through Zycus Login	Analyze	Source	iContract	SiM	SPM
8	1 Mr	Jerry.thomas@adobe.com	Jerry	thomas	Jerry T	jerry.thomas	claire.dunphy@zycus.com	No	Assign	Assign	Assign	Assign	Assign
9	2 Mr	frank.gerrard@adobe.com	frank	gerrard	Frank G	frank.gerrard	claire.dunphy@zycus.com	No	Assign	Assign	Assign	Assign	Assign
10	3 Ms	jessica.hampton@adobe.com	jessica	hampton	Jessica H	jessica.hampton	claire.dunphy@zycus.com	No	Assign	Assign	Assign	Assign	Assign
11	4 Ms	kristina.walsh@adobe.com	kristina	walsh	Kristina W	kristina.walsh	claire.dunphy@zycus.com	No	Assign	Assign	Assign	Assign	Assign
12													
13													
14													
15													
16													
17													
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19													
20													
21													
22													
23													
24													
25													
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27													
28													
29													
30													
31													
32													
33													
34													
35													

- Upload the file back to the tool



You are here: User Management > Users

+ Create New User

Search by User Name Go 29 Record(s) Found.

Activate Selected Users | De-activate Selected Users | Reset User Passwords

User Name	Email ID	Manager Email ID	Create User through Bulk Uploads	Browse...	UploadUser-Template.xlsx	Upload
Business User	iSource.businessuser.content@...	-	X X X X X	X	Active	Unlocked
Businessuser i...	iPerform.businessuser.content...	-	X X X X X	✓	Active	Unlocked

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

The screenshot shows the ZYCUS TMS User Management interface. At the top, there are tabs for User Management, Role Management, Preferences, Reports, and Master Data. Under User Management, there are sub-tabs for User Listing, User Groups, and Impersonate User Requests. Below these, a search bar allows users to search by User Name and a 'Go' button. A message indicates '29 Record(s) Found.' On the right side, there is a 'Upload Users' button with a file icon. A modal dialog box titled 'Alert' contains the text: 'The Bulk user upload will run in background. It will continue in the background even if you log out. You can view the details on the notifications log next to the 'Upload Users' link.' There is an 'Ok' button at the bottom of the dialog. The main table lists 29 user records with columns for User Name, Email ID, Manager E-mail, Status (Active/Unlocked), and various permissions.

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

This screenshot shows the same ZYCUS TMS User Management interface as the previous one, but with an error. A red box highlights a modal dialog box with the text: 'Create User through Bulk Upload: Browse... No file selected.' Below this, it says 'Download Excel Template'. The main message in the dialog is 'No user(s) updated in system.' and 'Click here to view error details.' The table below shows 34 records found, with the last record highlighted in yellow.

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

Errors encountered during upload of users

Row No.	Error Message
11	Mandatory field is missing.
12	Mandatory field is missing.

- 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".

The screenshot shows the Zycus TMS User Management interface. At the top, there's a navigation bar with links for Content Manage..., Companies, Hi, ZycusAdmin, and settings. Below the navigation is a sub-menu with User Management, Role Management, Preferences, Reports, and Master Data. Under User Management, there are links for User Listing, User Groups, and Impersonate User Requests. The main area displays a list of users with columns for User Name, Email ID, Manager Email ID, Field Library, OneView, and SIM. A button labeled '+ Create New User' is at the top left. A search bar with 'User Name' and a 'Go' button is at the top right, with a note that 29 Record(s) Found. Below the search is a row of buttons: Activate Selected Users, De-activate Selected Users, and Reset User Passwords. To the right of these buttons is a 'Upload Users' button with a bell icon. A callout box titled 'Previously uploaded files' appears over the user list, containing the message 'File upload completed Successfully' and details about the upload: Start Time : July 12, 2016 06:07:33 PM IST, End Time : July 12, 2016 06:07:43 PM IST, and a 'Show All' link.

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

This screenshot shows the same Zycus TMS interface as above, but the 'Previously uploaded files' callout is expanded. It displays the message 'File upload completed Successfully' and provides detailed statistics: Uploaded By : Zycus Admin, Uploaded On : July 12, 2016, Start Time : 06:07:33 PM IST, End Time : 06:07:43 PM IST, Successful : 5, and Errors : 5. At the bottom of the page, a footer bar includes the text '© 2016 - Zycus Inc. All Rights Reserved.'

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

You are here:: Role Management > Roles > Create New Role

Step 1 - Define Role (Provide Role Name and other details about the Role)

Create New Role 1 Define Role 2 Assign Activities 3 Activate Role	Role Details: Role Title*: <input type="text" value="Contract Author"/> Assign Product*: <input type="text" value="iContract"/> Role Description: <div style="border: 1px solid #ccc; padding: 5px;">This role will perform contract authoring activities.</div> Role Created On: <input type="text" value="2016/04/18"/> Role Created By: <input type="text" value="admin@zycus.com"/>
--	--

1 Save and Continue » | **Cancel**

Enter all the required information.

Step 2 - Activity Allocation To Role: "Contract_Author" (Select and assign Activities or Activity Groups to this Role)

Activity Name	Activity Type
<input type="checkbox"/> Group_Admin	Group Activity
<input checked="" type="checkbox"/> Group_Authoring	Group Activity
<input type="checkbox"/> Internal Template	Individual Activity
<input type="checkbox"/> External Template	Individual Activity
<input type="checkbox"/> Review Contract Subheader	Individual Activity
<input type="checkbox"/> Delete Contract Authoring	Individual Activity
<input type="checkbox"/> Create New Contract	Individual Activity
<input type="checkbox"/> Author Contract Subheader	Individual Activity
<input type="checkbox"/> Edit Contract Authoring	Individual Activity
<input type="checkbox"/> Check In Contract	Individual Activity
<input type="checkbox"/> Contracts Tab	Individual Activity
<input type="checkbox"/> Group_Compliance	Group Activity
<input type="checkbox"/> Group_Legal	Group Activity
<input type="checkbox"/> Group_Module_Acess	Group Activity
<input type="checkbox"/> Group_Repository	Group Activity
<input type="checkbox"/> Group_Zycus_Admin	Group Activity
<input type="checkbox"/> Online Help Tab Admin	Group Activity
<input type="checkbox"/> REPORTS_TAB	Group Activity
<input type="checkbox"/> TEST1	Group Activity
<input type="checkbox"/> TEST10	Group Activity
<input type="checkbox"/> TEST2	Group Activity
<input type="checkbox"/> TEST3	Group Activity
<input type="checkbox"/> TEST4	Group Activity
<input type="checkbox"/> TEST5	Group Activity
<input type="checkbox"/> TEST6	Group Activity
<input type="checkbox"/> TEST7	Group Activity
<input type="checkbox"/> TEST8	Group Activity
<input type="checkbox"/> TEST9	Group Activity
<input type="checkbox"/> Ungrouped Activities	Group Activity

Define which activities should be allotted to the defined role.



Save and Continue » | Cancel

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You are here: Role Management > Roles > Role Summary

Summary for Role: Contract_Author

Please verify the role details being created below

Role Definition

Role Name	Role Type	Role Description
Contract_Author	Custom Role	

Role for the Product

Product
iContract

Activities Allocated

Activity Name	Activity Code	Activity Type	Product Name
Author Contract Subheader	-	Non-System Activity	iContract
Check In Contract	-	Non-System Activity	iContract
Contracts Tab	-	Non-System Activity	iContract
Create New Contract	-	Non-System Activity	iContract
Delete Contract Authoring	-	Non-System Activity	iContract

Done | Cancel

Review the Role Summary.
Edit if required.

You are here: Roles

+ Add New Role

Search by: Role Name : contract author Go 16 Record(s) Found. Clear Search Results

Assign Roles in Bulk

Role Name	Assigned to Product	Role Type	Role Status	Actions
Contract Admin...	iContract	Default Role	Active	
Contract Analy...	iContract	Default Role	Active	
Contract Author	iContract	Default Role	Active	
Contract Autho...	iContract	Default Role	Inactive	
Contract Manag...	iContract	Default Role	Active	
Contract Revie...	iContract	Default Role	Active	
Contract_Author...	iContract	Custom Role	Active	
Contract_Author	iContract	Default Role	Active	
Contract_Manag...	iContract	Default Role	Active	
Contract_Manag...	iContract	Default Role	Active	

New Role will be listed on this page.

Confirm

Do you want to Change status?

Ok Cancel

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:

The screenshot shows the TMS Role Management interface. The top navigation bar includes User Management, Role Management (selected), Preferences, Reports, and Master Data. A search bar at the top right allows searching by Role Name, with 'contract author' entered and a 'Go' button. Below the search is a table titled 'Assign Roles in Bulk'. The table columns are Role Name, Assigned to Product, Role Type, Role Status, and Actions. The 'Actions' column contains icons for edit, delete, and bulk assignment. An orange circle labeled '1' is drawn around the 'Assign Roles in Bulk' button. An orange arrow points from this button to a user icon icon with the text 'Assign Role' below it.

The screenshot shows the 'Assign Role to Users' dialog box. The title bar indicates the current location is Role Management > Roles > Assign Role to Users. The main area displays a table with columns for User Name and User Email Id. Three users are listed: Vaishali D (email: vaishali.thakkar2@zycus.com), Gautam (email: gautam.shanbhag@zycus.com), and Harsh (email: harsh.khandhadia@zycus.com). To the right of the table, there are buttons for 'View All' and 'View Selected (2)'. An orange bracket on the right side groups the user list with the text 'Select users to whom you want to associate this role with.'. An orange circle labeled '2' is on the 'Save and Close' button at the bottom left.

Chapter 4. Company Preferences

How to Configure My Company's Security Setting?

1

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

Enforce Password History (Frequency of Password reuse)	3
Minimum Password Length:	8
Should the password contain at least 1 letter?	No
Should the password contain at least 1 number?	No
Should the password contain at least 1 special character?	No
Should the password contain upper-case English alphabets?	Yes
Prevent User from entering any consecutive character of user's name and email id?	No
Allow Spaces in Password?	No
Expire password when user does not login for:	60 days
Expire password when user does not change password for:	60 days
Password expiration reminder?	Yes
Password expiration reminder prior to:	15 days
Company user Session expire after:	15 mins
Maximum Number of Failed Login Attempts for a user:	5
Number of failed login attempts within:	10 mins
Time after which a locked account would be auto-unlocked:	5 mins
IP Sources:	(Empty Text Area)
View No. of Login-logs:	5
View User Concurrent Login:	Yes
Maximum Number of Concurrent Logins:	3
Session validation with IP?	No
Change user password on first time login?	No
No of passwords in history:	Do not keep history
Company user session length:	Ignore
Send email notification with password to a user when he/she is created?	Yes
Mail 'Password' or 'Password Reset Link' to user's Inbox:	Password
Check for automatic change in browser's user agent?	No
Policy Change Description*:	(Empty Text Area)

Save

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.

View No. of Login-logs: 18 (Invalid IP Source)

View User Concurrent Login: Yes

Maximum Number of Concurrent Logins: 3

Session validation with IP?: No

Change user password on first time login?: No

No of passwords in history: Do not keep history

Company user session length: Ignore

Send email notification with password to a user when he/she is created?: Yes

Mail 'Password' or 'Password Reset Link' to user's Inbox: Password

Check for automatic change in browser's user agent?: No

Policy Change Description *:

Ensuring effective change management within the company's production IT environment is extremely important in ensuring quality delivery of IT services as well as achieving compliance with industry standards.

Save

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Note: 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 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:

You are here: Company Preferences > Display Settings

Display Settings for Zycus

Application Preferences:

- Time Zone*: America/New_York - (GMT-5:00)
- Number Format*: #,##,##,##,##
- Date Format*: dd/MM/yyyy
- Time Format*: 24 Hours
- Currency*: US Dollar
- Locale*: English (US)
- Decimal Precision: 2

Fiscal Year Start: 01/04 Fiscal Year End: 31/03

Q1 Start: 01/04 Q1 End: 30/06

Q2 Start: 01/07 Q2 End: 30/09

Q3 Start: 01/10 Q3 End: 31/12

Q4 Start: 01/01 Q4 End: 31/03

Please Note: If the fiscal year is not specified 1 April - 31 March is the default definition of fiscal year

Existing Logo : Logo Not Present

New Company Logo : No file selected. [Recommended logo dimension is 100x30 pixels].

Email Settings*: Show Zycus Support Information in emails
tech-support@zycus.com
North America: 18004093507
International: +18004093507
 Show Custom Support Information in emails
Max 4000 Characters.

Save

* Indicates Mandatory Field

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.

1

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

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

Fiscal Year Start:	<input type="text"/>	Fiscal Year End:	<input type="text"/>
Q1 Start:	<input type="text"/>	Q1 End:	<input type="text"/>
Q2 Start:	<input type="text"/>	Q2 End:	<input type="text"/>
Q3 Start:	<input type="text"/>	Q3 End:	<input type="text"/>
Q4 Start:	<input type="text"/>	Q4 End:	<input type="text"/>
Please Note: If the fiscal year is not specified 1 April - 31 March is the default definition of fiscal year Existing Logo : <input type="checkbox"/> Logo Not Present			

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

Fiscal Year Start:	<input type="text" value="01/04"/>	Fiscal Year End:	<input type="text" value="31/03"/>
Q1 Start:	<input type="text" value="01/04"/>	Q1 End:	<input type="text" value="30/06"/>
Q2 Start:	<input type="text" value="01/07"/>	Q2 End:	<input type="text" value="30/09"/>
Q3 Start:	<input type="text" value="01/10"/>	Q3 End:	<input type="text" value="31/12"/>
Q4 Start:	<input type="text" value="01/01"/>	Q4 End:	<input type="text" value="31/03"/>
Please Note: If the fiscal year is not specified 1 April - 31 March is the default definition of fiscal year			

Decimal Precision:	<input type="text" value="2"/>		
Fiscal Year Start:	<input type="text" value="01/04"/>	Fiscal Year End:	<input type="text" value="31/03"/>
Q1 Start:	<input type="text" value="01/04"/>	Q1 End:	<input type="text" value="30/06"/>
Q2 Start:	<input type="text" value="01/07"/>	Q2 End:	<input type="text" value="30/09"/>
Q3 Start:	<input type="text" value="01/10"/>	Q3 End:	<input type="text" value="31/12"/>
Q4 Start:	<input type="text" value="01/01"/>	Q4 End:	<input type="text" value="31/03"/>
Please Note: If the fiscal year is not specified 1 April - 31 March is the default definition of fiscal year Existing Logo : <input type="checkbox"/> Logo Not Present			
New Company Logo :	<input type="button" value="Browse..."/>	No file selected.	<input type="button" value="Upload"/>
<small>(i) [Recommended logo dimension is 100x30 pixels].</small>			
Email Settings* :	<input checked="" type="radio"/> Show Zycus Support Information in emails <small>(i)</small> tech-support@zycus.com North America: 18004093507 International: 0080099287111/0080099287000		
<input type="radio"/> Show Custom Support Information in emails <small>(i)</small> <small>Max 4000 Characters.</small>			
<input type="button" value="Save"/>			
<small>© 2016 - Zycus Inc. All Rights Reserved.</small>			

Chapter 5. Reports

Understanding Reports Page

The screenshot shows the TMS Reports page with the following interface elements:

- Pre-Packaged reports provided by Zycus:** A section containing three reports: "List of users grouped by role name and role type p...", "List of users per product", and "Matrix report detailing number of users in a role p...".
- Create New Report:** A button located at the top center.
- Search:** A search bar with the placeholder "Pre-Packaged Reports".
- My Reports:** A sidebar section containing "User Groups & Role...".
- Shared Reports:** A sidebar section containing "Shared Reports".
- Actions dropdown:** A dropdown menu with options "Actions" and "View details".
- Report Details:** A main table listing reports with columns: Report Name, Folder Name, Last Refresh on, and Actions. It shows three entries from the Pre-Packaged Reports folder.
- Page Navigation:** A page navigation bar showing "Showing page 1 of 1".

Annotations with orange arrows point to specific areas:

- An arrow points to the "Pre-Packaged Reports" folder in the sidebar with the text "Reports created and saved by you will be visible here".
- An arrow points to the "Actions" dropdown with the text "Use Actions dropdown to view details for the report".
- An arrow points to the "Shared Reports" folder in the sidebar with the text "Reports shared with you by other users".

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.

The screenshot shows the Zycus TMS interface. At the top, there's a navigation bar with links for User Management, Role Management, Preferences, Reports, and Master Data. The Master Data link is highlighted. On the left, a sidebar titled "Zycus Master" lists various master data entities: Currencies, Countries, States, Units of Measure, Exchange Rates, Regions, Addresses, Locations, Categories, Payment Terms, Collections, Organization Units, Cost Centers, and Procurement Scope Configuration. Under Procurement Scope Configuration, there's a single item: "Admin Scope". Below the sidebar, a message says "Click a master data entity to review and add data via the screen or by uploading file(s)". At the bottom of the screen, a footer bar contains the text "© 2016 - Zycus Inc., All Rights Reserved".

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?

The screenshot shows the TMS application interface. The top navigation bar includes 'User Management', 'Role Management', 'Preferences', 'Reports', and 'Master Data'. The left sidebar under 'Zycus Master' has a 'Currencies' link highlighted with a yellow box. The main content area is titled 'Currencies' and displays a grid of currency records. The grid columns are 'Code', 'Currency', 'ISO Code', 'ERP ID', 'Status', and 'Actions'. The 'Actions' column contains an 'Edit' button for each row. An orange circle labeled '1' points to the 'Edit' button for the 'THB' row, which corresponds to 'Thai Baht'. The grid shows 196 total records. At the bottom right of the grid, there is a note: 'Showing Page 3 of 20' and a 'Close Wizard' button.

The screenshot shows the 'Edit Currency' wizard. It has fields for 'Name*' (Thai Baht), 'ISO Code*' (THB), and 'ERP ID'. There are 'Update Currency' and 'Cancel' buttons at the bottom. An orange arrow points from the 'Edit' button in the previous screenshot to this screen. An orange circle labeled '2' is on the left side of the wizard. A callout text says: 'Edit Wizard opens. Make the required changes.'

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

1 Select the currencies you want to activate/deactivate.

2 Click Activate or Deactivate as per your requirement.

	Code	Currency	ISO Code	ERP ID	Status	Actions
WST	Samoan Tala	WST			Active	
VUV	Ni-Vanuatu Vatu	VUV			Active	
VND	Vietnamese New Dong	VND			Active	
VEF	Venezuela Bolivar Fuerte	VEF			Active	
VEB	Venezuelan Bolivar123	VEB			Active	
UZS	Uzbekistani Som	UZS			Active	
UYU	Uruguayan Peso Uruguayo	UYU			Active	
USD	American Dollar..	USD			Active	
UGX	Ugandan Shilling	UGX			Active	
UAH	Ukrainian Hryvnia	UAH			Active	

Showing Page 2 of 20

3 Close Wizard

If you choose to activate:



Currencies

For Selected:

Total Records: 196 Search In Code Go

Code	Currency	ISO Code	ERP ID	Status	Actions
123	INR	ISO-INC1		✗ Inactive	<input type="button" value="Edit"/>
ABCD2	ABCD2	ABCD2		✓ Active	<input type="button" value="Edit"/>
CURR9797	INR	ISO-INC		✓ Active	<input type="button" value="Edit"/>
2356	test1	test1		✗ Inactive	<input type="button" value="Edit"/>
123456	盘开裂青蛙混杂	盘开裂青蛙混杂		✗ Inactive	<input type="button" value="Edit"/>
XCD	East Caribbean Dollar <script>alert('here')</script>	XCD		✓ Active	<input type="button" value="Edit"/>
XAF	CFA Franc BEAC	XAF		✓ Active	<input type="button" value="Edit"/>

Showing Page 1 of 20 Close Wizard

4 Activation message will be displayed on the screen

If you choose to deactivate:

Confirm

? These Currencies may be in use, Do you wish to deactivate Currencies?

5

Currencies

Total Records: 196

Code	Currency	ISO Code	ERP ID	Status	Actions
123	INR	ISO-INC1		Inactive	<input type="button" value="Edit"/>
ABCD2	ABCD2	ABCD2		Active	<input type="button" value="Edit"/>
CURR9797	INR	ISO-INC		Active	<input type="button" value="Edit"/>
2356	test1	test1		Inactive	<input type="button" value="Edit"/>
123456	盘开裂青蛙混杂	盘开裂青蛙混杂		Inactive	<input type="button" value="Edit"/>
XCD	East Caribbean Dollar <script>alert('here')</script>	XCD		Active	<input type="button" value="Edit"/>
XAF	CFA Franc BEAC	XAF		Active	<input type="button" value="Edit"/>

Showing Page 1 of 20

Deactivation message will be displayed on the screen

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Countries

How to Edit Countries Provided For My Products?

The screenshot shows the TMS Countries page. On the left, a sidebar menu lists various master data categories: Currencies, Countries, States, Units of Measure, Exchange Rates, Regions, Addresses, Locations, Categories, Payment Terms, Collections, Organization Units, Cost Centers, Procurement Scope Configuration, and Admin Scope. The 'Countries' link is selected and highlighted with a yellow box. The main content area is titled 'Countries' and displays a table of countries. The table has columns for Code, Country, ISO Code, ERP ID, Status, and Actions. A row for Uruguay (UY) is selected, indicated by a blue highlight. An orange circle labeled '1' is positioned over the 'Edit' icon in the Actions column for Uruguay. At the bottom right of the table, there is a note: 'Showing Page 3 of 24' and a 'Close Wizard' button.

The screenshot shows the 'Edit Country' wizard window. It has a title bar 'Edit Wizard' and a sub-section 'Edit Country'. The form contains fields for 'Name *:' (Uruguay), 'ISO Code *:' (UY), and 'Unique Code *:' (UY). There is also a field for 'ERP ID:' which is currently empty. At the bottom, there are 'Update Country' and 'Cancel' buttons. An orange arrow points from the text 'Edit Wizard opens. Make the required changes.' to the 'Edit Country' section of the wizard window. An orange circle labeled '2' is positioned at the bottom left of the wizard window.

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

Zycus Master

Countries

Click Activate or Deactivate as per your requirement.

For Selected: **Activate** **Deactivate**

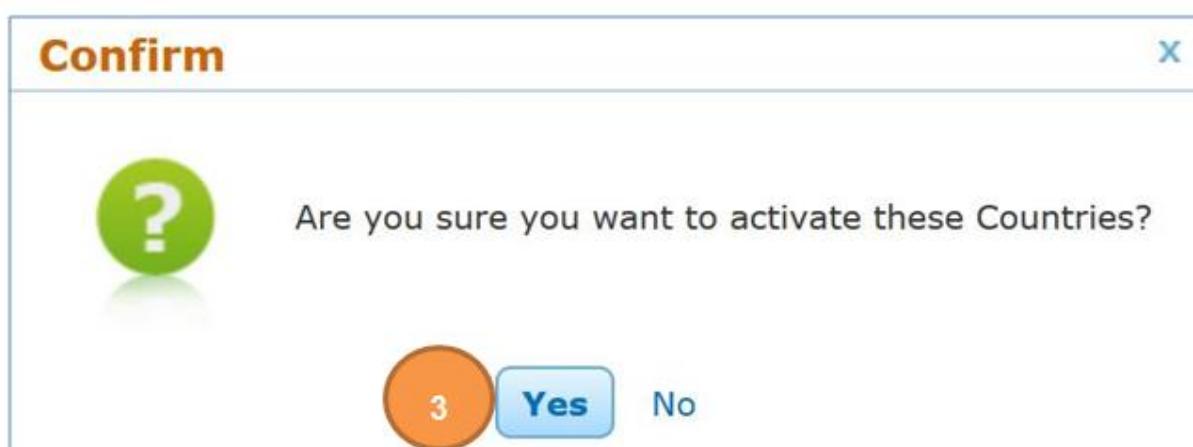
Total Records: 234

	Code	Country	ISO Code	ERP ID	Status	Actions
<input type="checkbox"/>	ZA	Zambia	ZA		Active	
<input type="checkbox"/>	YI	Yugoslavakia	YI		Active	
<input type="checkbox"/>	YM	Yemen	YM		Active	
<input type="checkbox"/>	WF	Wallis and Futuna	WF		Active	
<input type="checkbox"/>	VQ	Virgin Islands	VQ		Active	
<input type="checkbox"/>	VM	Vietnam	VM		Active	
<input type="checkbox"/>	VE	Venezuela	VE		Active	
<input type="checkbox"/>	NH	Vanuatu	NH		Active	
<input type="checkbox"/>	UZ	Uzbekistan	UZ		Active	
<input type="checkbox"/>	UY	Uruguay	UY		Active	

Showing Page 3 of 24

Close Wizard

If you choose to activate:



Countries

For Selected: [Activate](#) | [Deactivate](#)

Total Records: 217

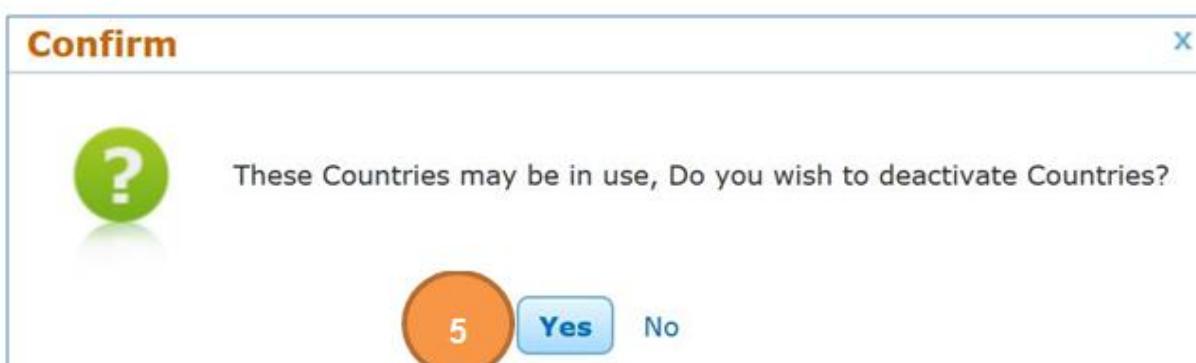
Code	Country	ISO Code	ERP ID	Status	Actions
YI	Yugoslavia	YI		Active	Edit
WZ	Swaziland	WZ		Active	Edit
WS	Samoa	WS		Active	Edit
WF	Wallis and Futuna	WF		Active	Edit
WA	Namibia	WA		Active	Edit
VT	Holy See (Vatican City)	VT		Active	Edit
VQ	Virgin Islands	VQ		Active	Edit

Showing Page 1 of 22

[Close Wizard](#)

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If you choose to deactivate:



Countries

For Selected:

Total Records: 217

	Code	Country	ISO Code	ERP ID	Status	Actions
	YI	Yugoslavia	YI		Active	
	WZ	Swaziland	WZ		Active	
	WS	Samoa	WS		Active	
	WF	Wallis and Futuna	WF		Active	
	WA	Namibia	WA		Active	
	VT	Holy See (Vatican City)	VT		Active	
	VQ	Virgin Islands	VQ		Active	

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6

Deactivation message will be displayed on the screen

States

How to Edit a State?



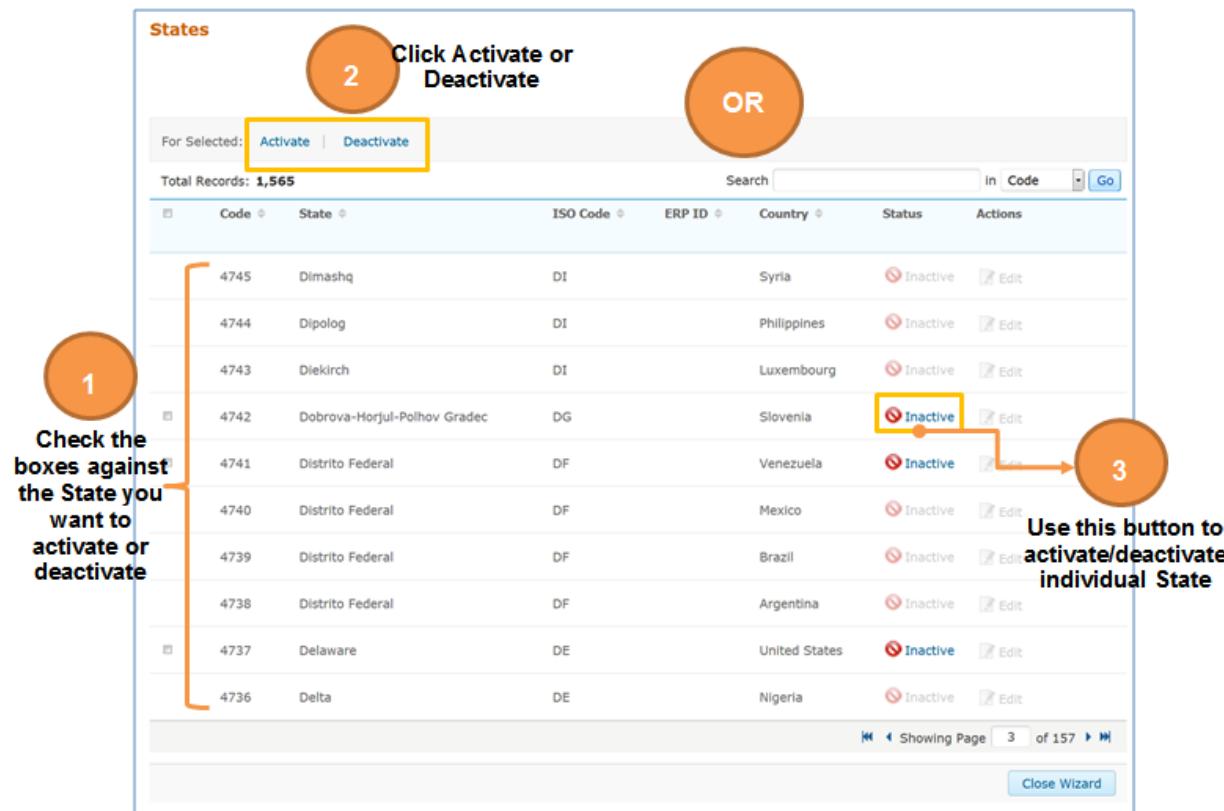
A screenshot of the 'Edit State' dialog box. It contains the following fields:

- Name*: Dnipropetrov'ska Oblast'
- Unique Code*: 4756 (highlighted with a yellow border)
- ISO Code*: DP
- Country*: Ukraine
- ERP ID: (empty input field)

An orange circle labeled '3' is positioned over the 'Update State' button, which is highlighted with a yellow border. Another orange circle labeled '1' is positioned over the 'Edit' button in the header of the dialog.

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?

The screenshot shows the TMS Master Data interface. On the left, there's a sidebar with a yellow highlight on the 'Units of Measure' section. The main area displays a list of units of measure with columns for Code, UoM Code, UoM Description, Quantity Type, ERP ID, Status, and Actions. At the top right of this list, there's a search bar and a 'Go' button. Below the list, it says 'Showing Page 1 of 61'. A large orange circle labeled '1' is drawn around the 'Add UoM' button at the top left of the list area.

This screenshot shows the 'Add UoM' dialog box overlaid on the Master Data screen. The dialog has a title 'Add the required details'. It contains fields for 'UoM Code*' (kg), 'Unique Code*' (kg), 'UoM Description*' (kilogram), 'Quantity Type*' (Decimal), and 'ERP ID'. At the bottom of the dialog, there are 'Add UoM' and 'Reset' buttons. A large orange circle labeled '2' is around the dialog title, and another orange circle labeled '3' is around the 'Add UoM' button.

ADOBE Master

Units of Measure

Add UoM

For Selected: [Activate](#) | [Deactivate](#)

Total Records: 8 Search In [Go](#) [Clear Results](#)

	Code	UoM Code	UoM Description	Quantity Type	ERP ID	Status	Actions
<input type="checkbox"/>	kgs	kgs	kilograms	Decimal		Active	Edit
<input type="checkbox"/>	gm/kg	gm/kg	GRAMS PER KILOGRAM	Decimal		Inactive	Edit
<input type="checkbox"/>	Kg/m ²	Kg/m ²	KILOGRAMS PER SQAURE METER	Decimal		Inactive	Edit
<input type="checkbox"/>	Kg/m	Kg/m	KILOGRAMS PER METER	Decimal		Inactive	Edit
<input type="checkbox"/>	Kg/cm ²	Kg/cm ²	KILOGRAM PER SQUARE CENTIMETER	Decimal		Inactive	Edit
<input checked="" type="checkbox"/>	Kg	Kg	KILOGRAM	Decimal		Inactive	Edit
	KGM	KGM	kilogram	Decimal		Inactive	Edit
<input type="checkbox"/>	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?

1 Click Edit against the UOM you want to modify

Units of Measure

UoM Code and Unique Code cannot be edited

UoM Code*: S Unique Code*: S

UoM Description*: SECOND Quantity Type*: Decimal

ERP ID: [empty]

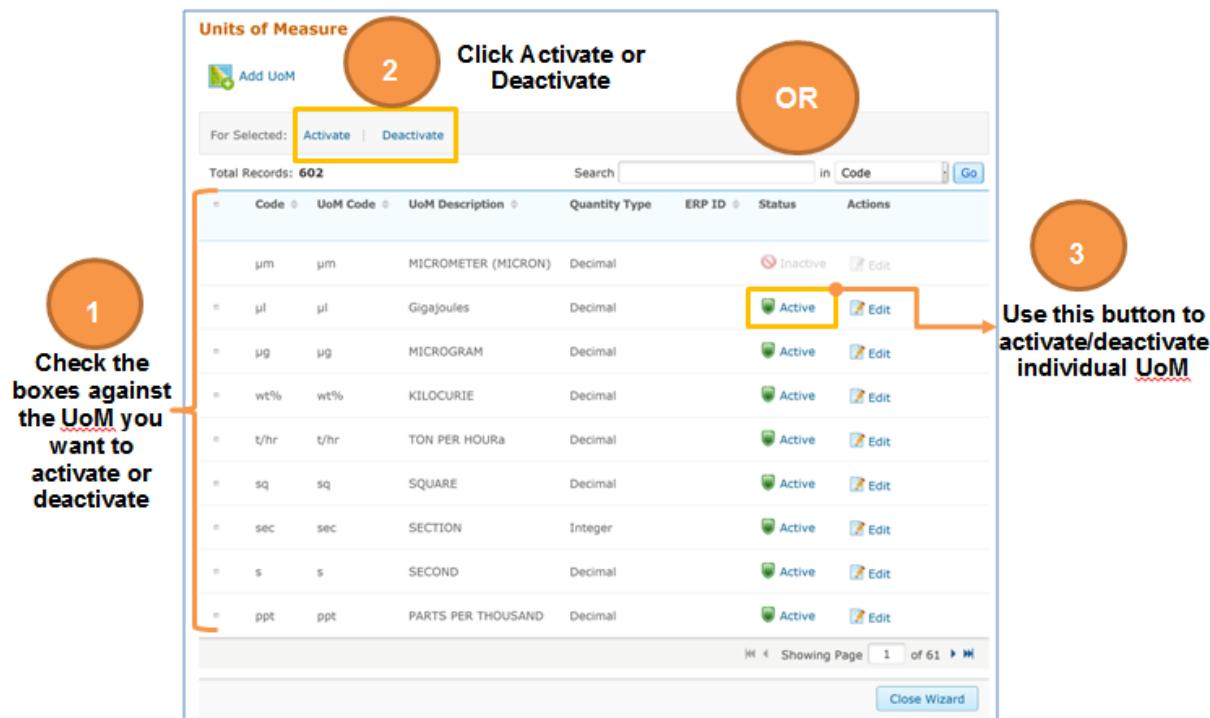
2 Update the remaining information as required

3 Update UoM Cancel

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?

The screenshot shows the 'Add Exchange Rate' dialog box. It has fields for 'From*', 'Rate*', 'Purpose*', 'To*', 'Inverse Rate*', and 'ERP ID'. There are 'Add Exchange Rate' and 'Reset' buttons at the bottom. Step 1 highlights the 'Add Exchange Rate' button. Step 2 highlights the entire dialog box with a callout pointing to it. Step 3 highlights the 'Add Exchange Rate' button again.

1 Add Exchange Rate

Import Exchange Rates Via File

From*:

To*:

Rate*:

Inverse Rate*:

Purpose*:

ERP ID:

Add Exchange Rate Reset

2 Dialog box opens. Enter the required fields

3 Add Exchange Rate

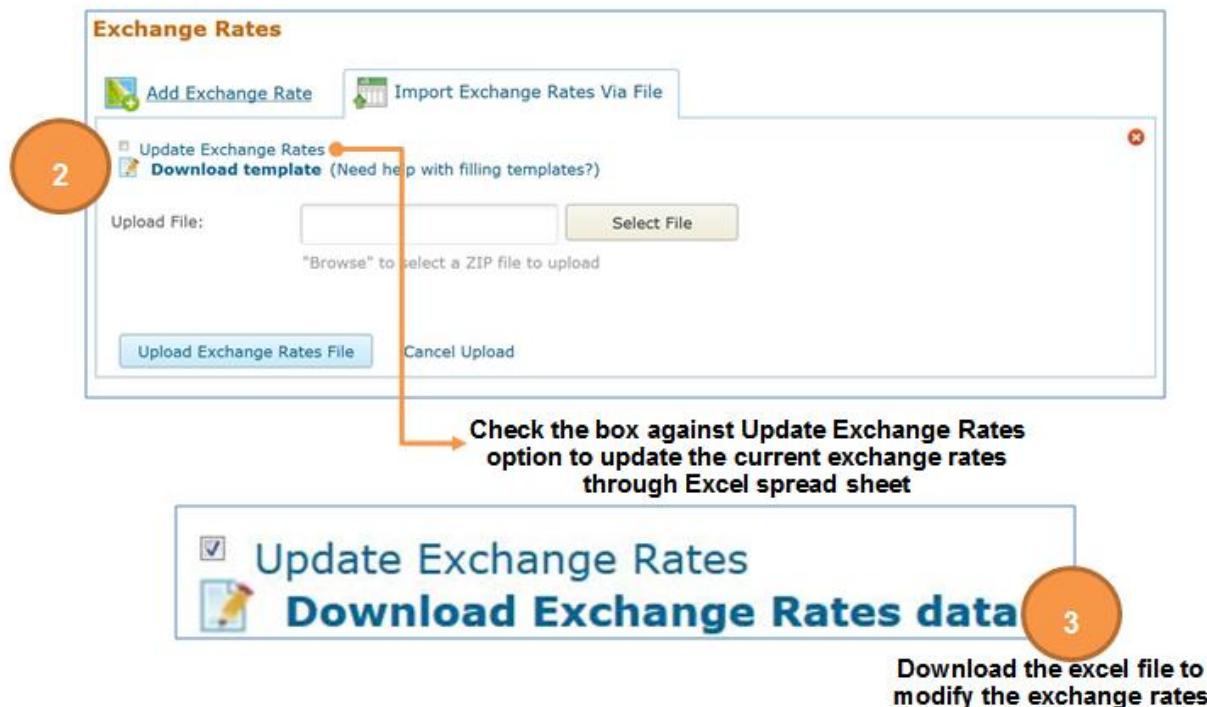
Reference: Follow the same steps as shown for [How to Add Unit of Measures?](#)

How to Bulk Upload the Exchange Rates?

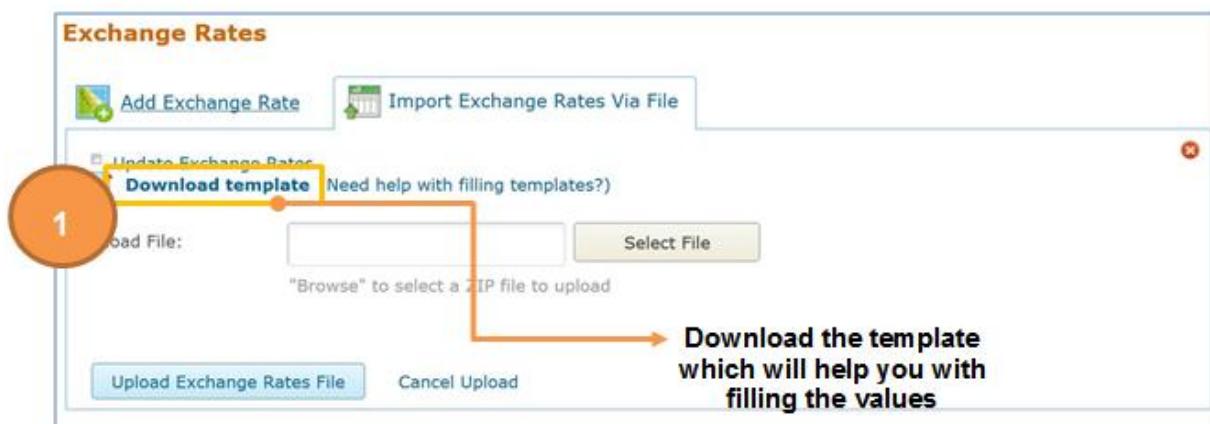
The screenshot shows the TMS Exchange Rates page. On the left, there's a sidebar with various master data categories. The 'Exchange Rates' section is expanded, showing 'Regions', 'Addresses', 'Locations', 'Categories', 'Payment Terms', 'Collections', 'Organization Units', 'Cost Centers', and 'Procurement Scope Configuration'. The main area is titled 'Exchange Rate' and contains a table of exchange rates. At the top right of this area, there's a button labeled 'Import Exchange Rates Via File'. This button is highlighted with a yellow box and circled with an orange circle containing the number 1.

From	To	Rate	Inverse Rate	Purpose	ERP ID	Modified On	Status	Actions
INR	UGX	50	0.02000	system		2016/02/19	Active	<input type="checkbox"/> Edit
USD	ISO-INC1	45	0.02222	system		2015/08/28	Inactive	<input type="checkbox"/> Edit
SEK	AED	10	0.10000	system		2015/08/17	Active	<input type="checkbox"/> Edit
ZMK	AED	10	0.10000	system		2015/07/30	Active	<input type="checkbox"/> Edit
ISO-INC	VUV	5	0.20000	system		2015/04/15	Inactive	<input type="checkbox"/> Edit
SEK	INR	10	0.10000	system		2015/04/09	Active	<input type="checkbox"/> Edit
ZAR	INR	5.61000	0.17825	system		2015/04/03	Active	<input type="checkbox"/> Edit
USD	VEB	12	0.08333	system		2015/04/03	Active	<input type="checkbox"/> Edit
test1	AUD	80	0.01250	system		2015/04/02	Inactive	<input type="checkbox"/> Edit
XAF	WST	235	0.00426	system		2015/04/15	Active	<input type="checkbox"/> Edit

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.

A	B	C	D	E	F	G	H
1	From Currency*	To Currency*	Rate*	Rate Inverse*	Purpose*	ERP ID*	Status*
2	USD	AUD	0.9622	1.039284972	DEFAULT	ERPID01	
3	USD	BWP	7.4294	0.134600371	Source need	ERPID02	
4	USD	EUR	0.7794	1.283038235	Source need	ERPID03	
5	USD	FJD	1.7778	0.562492969	DEFAULT	ERPID04	
6	USD	FKP	0.6501	1.538224888	DEFAULT	ERPID05	
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							

Exchange Rates

Add Exchange Rate Import Exchange Rates Via File

Update Exchange Rates
Download template (Need help with filling templates?)

Upload File: tenant_exchange_rates.zip (58...)

Select File

"Browse" to select a ZIP file to upload

4 Upload Exchange Rates File Cancel Upload

3

Browse for the .zip file you modified on your computer

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.

- For Selected: Activate | Deactivate

- Use  For Selected: Activate | Deactivate



Active



Inactive

- To activate/deactivate individual exchange rates, use  Active |  Inactive

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

Regions

How to Add Regions?

The screenshot shows a 'Regions' form with the following fields:

- Name *:** A text input field.
- Unique Code *:** A text input field.
- Parent Region:** A dropdown menu labeled '--Select--'.
- ERP ID:** A text input field.

At the bottom are two buttons: **Add Region** (highlighted with a yellow box and circled 1) and **Reset**.

Callouts indicate the following steps:

- 1**: Points to the **Add Region** button.
- 2**: Points to the text input field for 'Name' with the annotation: "Dialog box opens. Enter the required fields".
- 3**: Points to the **Add Region** button at the bottom of the form.

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.

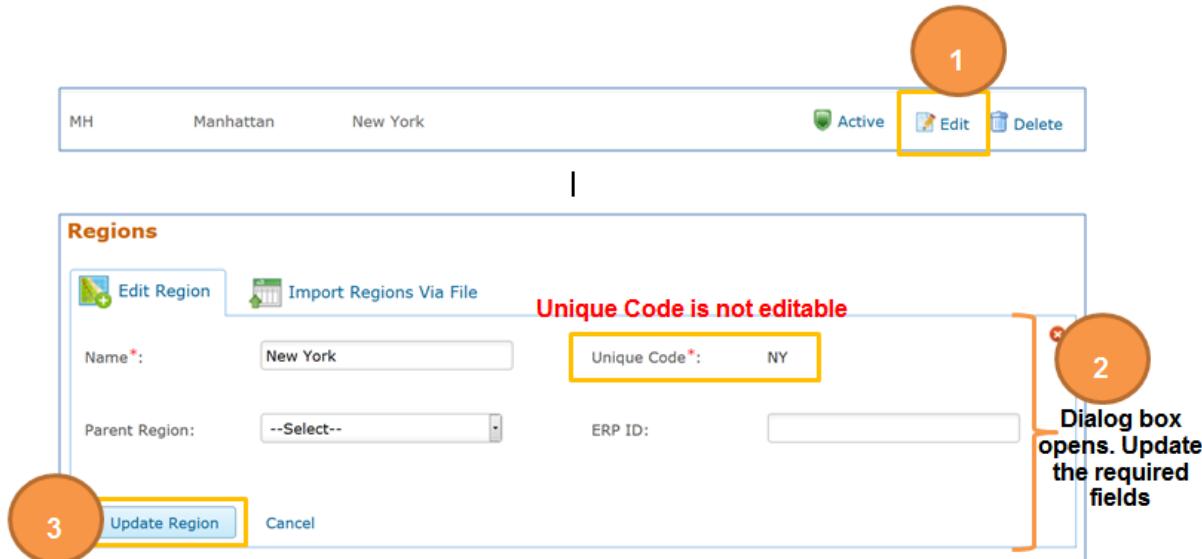
- For Selected: Activate | Deactivate
- Use



- 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?

Regions

Use the highlighted button to delete the respective entry

Address

How to Add Addresses?

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

1 Add Address

2 Dialog box opens. Enter the required fields

3 Add Address

Country and state will be available as per previous configurations

Address can be classified as highlighted types

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.

- For Selected: [Activate](#) | [Deactivate](#)

- Use



Active



Inactive

- 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?

	Code	Name	City, State	Zip	Country	Use as	ERP ID	Status	Actions
<input type="checkbox"/>	HQ	HeadQuarters	Manhattan, New York		United States			Active	

1

Addresses

[Edit Address](#) [Import Addresses Via File](#) Legends:

Unique Code is not editable

Name*: HeadQuarters	Unique Code*: HQ
Address Line 1*: 212, Baker Street	Phone: +1-342-4523
Address Line 2: Block 3	Fax:
Address Line 3: Manhattan	Email: jasmine@zycus.com
Address Line 4: New York	County:
Website URL:	Country*: United States
Zip:	State: New York
City:	ERP ID:

Use as Bill-to? Receive Invoices?

Use as Ship-to?

2 Dialog box opens. Update the required fields

3

How to Delete an Address?

	Code	Name	City, State	Zip	Country	Use as	ERP ID	Status	Actions
<input type="checkbox"/>	HQ	HeadQuarters	Manhattan, New York		United States			Active	

1

Use the highlighted button to delete the respective entry

Location

How to Add Location?

Locations

1 **Add Location** **Import Locations Via File**

Name *:	-Pittsford Chamber of Commerce	Unique Code *:	LOC002
Region *:	Manhattan	Ship-to address *:	HeadQuarters
Bill-to address *:	HeadQuarters	Invoice delivery address *:	HeadQuarters
AP Contact:	Adobe-All	ERP ID:	ERP002

3 **Add Location** **Reset**

2 Dialog box opens. Enter the required fields

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.

For Selected: Activate | Deactivate

- Use



Active



Inactive

- 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?

	Code	Name	Region	Bill-to address	Invoice delivery address	Ship-to address	ERP ID	Status	Actions
	T3-Pittsford Chamber of Commerce	LOC002	Manhattan	HeadQuarters	HeadQuarters	HeadQuarters	ERP002	Active	Edit Delete
	T3-Niagara Square	LOC001	Manhattan	T3-Niagara Square	T3-Niagara Square	T3-Niagara Square	ERP001	Active	Edit Delete

Locations

Edit Location
 Import Locations Via File

Unique Code is not editable

Name *:	-Pittsford Chamber of Commerce	Unique Code *:	LOC002
Region *:	Manhattan	Ship-to address *:	HeadQuarters
Bill-to address *:	HeadQuarters	Invoice delivery address *:	HeadQuarters
AP Contact:	Adobe-All	ERP ID:	ERP002

3 Update Location Cancel

2 Dialog box opens. Update the required fields

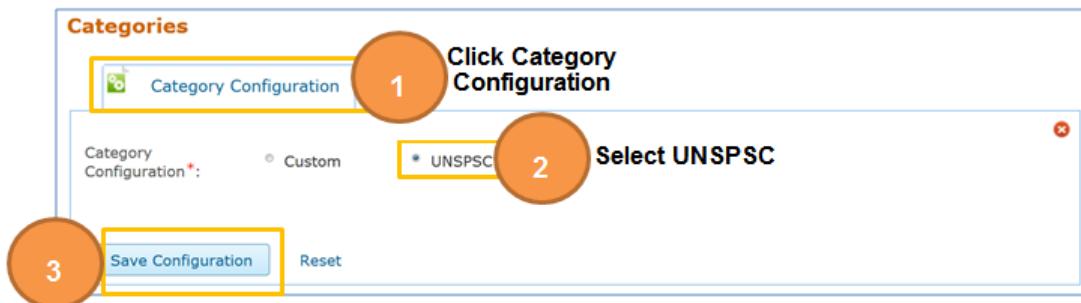
How to Delete a Location?

	Code	Name	Region	Bill-to address	Invoice delivery address	Ship-to address	ERP ID	Status	Actions
	T3-Pittsford Chamber of Commerce	LOC002	Manhattan	HeadQuarters	HeadQuarters	HeadQuarters	ERP002	Active	Edit Delete
	T3-Niagara Square	LOC001	Manhattan	T3-Niagara Square	T3-Niagara Square	T3-Niagara Square	ERP001	Active	Edit Delete

1 Use the highlighted button to delete the respective entry

Categories

How to Configure UNSPSC Categories?



ADOBE Master

Categories

Total Records: 41,743

Category Code	Category Name	Parent Category	Status	Actions
99999999	Exempt	Exempt3		
99999900	Exempt3	Exempt2		
99990000	Exempt2	Exempt1		
99000000	Exempt1	-		
94132004	Freedom of speech defense associations	Human rights advocacy and defense associations		
94132003	Physical or mental torture defense associations	Human rights advocacy and defense associations		
94132002	Prisoners defense services	Human rights advocacy and defense associations		
94132001	Children rights defense services	Human rights advocacy and defense associations		
94132000	Human rights advocacy and defense associations	Civic organizations and associations and movements		
94131903	Threatened animals protection associations	Animal protection associations		

Showing Page 1 of 4175

Close Wizard

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3 Categories with respect to UNSPSC will get populated automatically

How to Configure Custom Categories?

Click Category Configuration

Select Custom

Fill the required details

Parent Category can be defined when you are adding a child element. For example, adding Keyboards as child element to parent Computer Hardware

Select Category

Categories

Search Go

Computer Hardware

8 Search for parent category

Save Cancel

Category Code	Category Name	Parent Category	Category Description	ERP ID	Status	Actions
10000000	Keyboards	Computer Hardware	Different types of keyboards (usb, wireless) will be housed under this category	ERP0011	Active	
	Computer Hardware	-	Computer related hardware will be housed under this category	ERP001	Active	

Parent-Child category will get linked and listed

10

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.

For Selected: Activate Deactivate

- Use



Active



Inactive

- 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?

Category Code	Category Name	Parent Category	Category Description	ERP ID	Status	Actions
10000001	Keyboards	Computer Hardware	Different types of keyboards (usb, wireless) will be housed under this category	ERP0011	Active	Edit Delete
10000000	Computer Hardware	-	Computer related hardware will be housed under this category	ERP001	Active	Edit

1

Categories

Edit Category Import Categories Via File Category Configuration

Category Code is not editable

Category Name *:	Computer Hardware
Parent Category:	<input type="button" value="Lookup"/>
ERP ID:	ERP001
Category Description: Computer related hardware will be housed under this category	

Update Category Cancel

2

Dialog box opens. Update the required fields

3

How to Delete a Custom Category?

Category Code	Category Name	Parent Category	Category Description	ERP ID	Status	Actions
10000001	Keyboards	Computer Hardware	Different types of keyboards (usb, wireless) will be housed under this category	ERP0011	Active	Edit Delete
10000000	Computer Hardware	-	Computer related hardware will be housed under this category	ERP001	Active	Edit Delete

1

Use the highlighted button to delete the respective entry

Payment Terms

How to Add Payment Terms?

Payment Terms

1 Add Payment Term Import Payment Terms Via File

Name *:	NET120	Unique Code *:	UNQ001
Credit Days *:	120	Days to avail discount *:	100
% Discount *:	25	ERP ID:	ERP001

3 Add Payment Term Reset

2 Dialog box opens. Enter the required fields

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.

- For Selected: Activate | Deactivate

- To activate/deactivate individual payment term, use



Active



Inactive

How to Edit a Payment Term?

1 Click the **Edit** button in the Actions column of the payment term grid.

2 Dialog box opens. Update the required fields. **Unique Code is not editable**

3 Click the **Update Payment Term** button.

Code	Payment Term	Credit Days	Days to avail discount	% Discount	ERP ID	Status	Actions
UNQ001	NET120	120	100	25	ERP001	Active	Edit

Payment Terms

Edit Payment Term **Import Payment Terms Via File**

Name*: NET120 Unique Code*: UNQ001

Credit Days*: 120 Days to avail discount*: 100

% Discount*: 25 ERP ID: ERP001

Update Payment Term Cancel

Organization Units

How to Add Organization Units?

Organization Units

1 **Add Level**

2 Give name for your organization unit
Name*: Products

3 **Add Level** Reset

Add custom fields **This feature is useable for adding brands for your company**

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?

Code	Level	Actions
ORG_LVL_7	Products	Edit Delete
ORG_LVL_6	Company	Edit Delete
ORG_LVL_1	ACMENG-SERVICE	Edit Delete

Organization Units

Edit Level

Name*: Products

Add custom fields

Cancel

3 **Update Level**

2 Clicking Edit opens the dialog box. Make changes

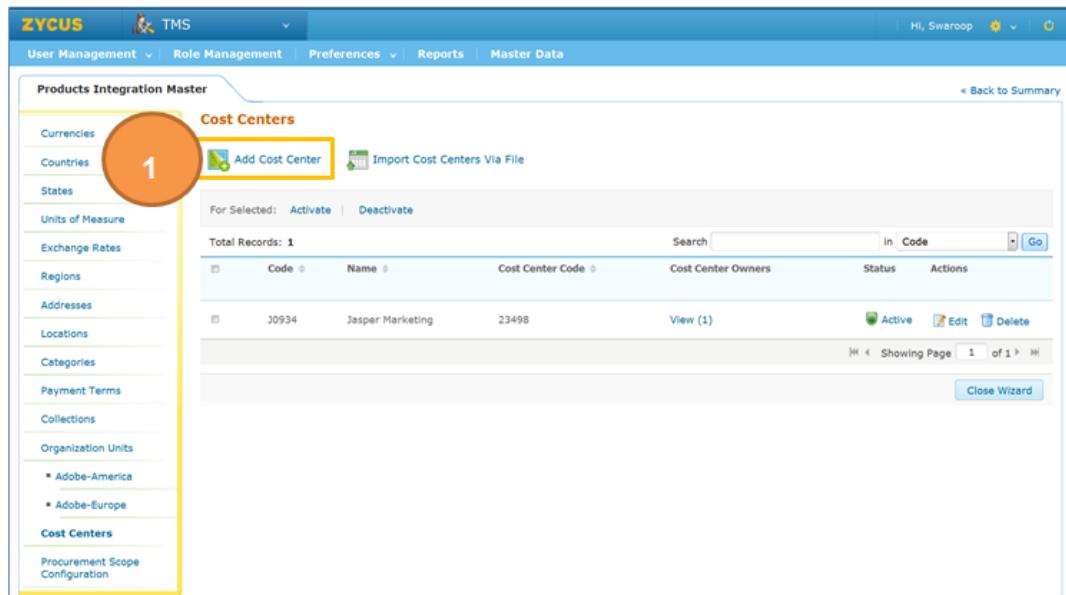
How to Delete Organization Unit?

Code	Level	Actions
ORG_LVL_7	Products	Edit Delete
ORG_LVL_6	Company	Edit Delete
ORG_LVL_1	ACMENG-SERVICE	Edit Delete

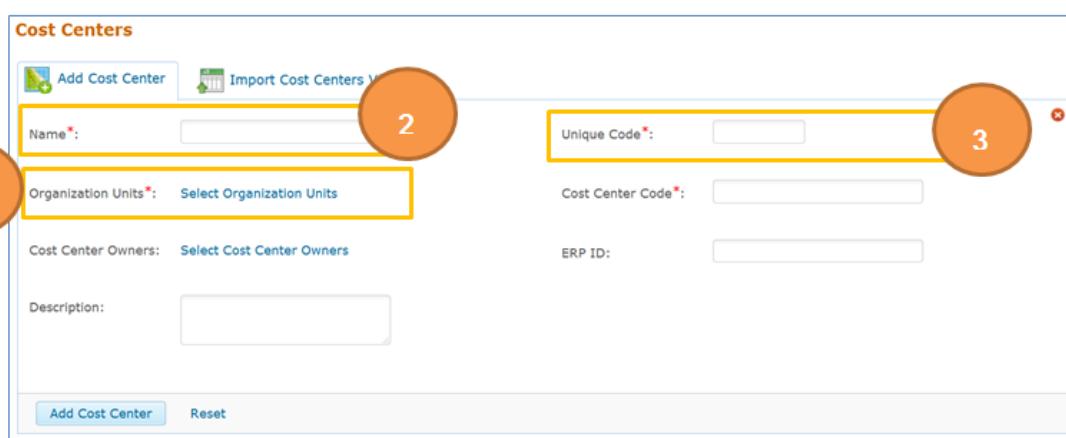
1
Use the highlighted button to delete the respective entry

Cost Centers

How to Add a Cost Center?



The screenshot shows the 'Products Integration Master' section of the ZYCUS TMS interface. On the left, a sidebar lists various master data categories. Under 'Cost Centers', there is a sub-section for 'Adobe-America' and 'Adobe-Europe'. The main area is titled 'Cost Centers' and contains a table with one record: J0934, Jasper Marketing, 23498. A large orange circle labeled '1' highlights the 'Add Cost Center' button.



This is a detailed view of the 'Add Cost Center' form. It includes fields for 'Name*', 'Organization Units*', 'Cost Center Owners', 'Description', 'Unique Code*', 'Cost Center Code*', and 'ERP ID'. A large orange circle labeled '2' highlights the 'Name*' input field. Another orange circle labeled '3' highlights the 'Unique Code*' input field, which has a red 'X' icon indicating it is required.

5
Select the Organization Unit(s) at each organization level

Select Organization Units

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

6
Select Organization Unit

Select Organization Units

Selected Adobe-America	Adobe-Europe
Adobe-Photoshop	Select Organization Unit

Save Cancel

7 Select unit(s)

8

Code	Name	Parent Level
DW2354	Adobe-Dreamweaver	Adobe-Photoshop

Showng Page 1 of 1

Save Cancel

9

Add Cost Center Import Cost Centers Via File

Name*: [] Unique Code*: []

Organization Units*: Select Organization Units

Cost Center Code*: []

Cost Center Owners: Select Cost Center Owners

ERP ID: []

Description: []

Add Cost Center Reset

Select owners for your cost center

10

11

Currency*: USD

User Approval Limit

Aditi Between 0 and 10000

Kashmira Kashmira | imran.khan@zycus.com

AM Arpita Mandal | arpita.mandal@zycus.com

Admin-Int. Integration A | Integration@admin.com

Total 4

Save Cancel

Define approval limit for each owner

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.

Cost Centers

Add Cost Center Import Cost Centers Via File

Name*: Global Sales	Unique Code*: GS983
Organization Units*: Organization Units selected	Cost Center Code*: 2347895
Cost Center Owners: 1 Cost Center Owner Selected	ERP ID:
Description:	

11 After you complete filling all the required details, add the cost center

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?

Cost Centers

Add Cost Center Import Cost Centers Via File

For Selected: Activate | Deactivate

Total Records: 1	Search	in	Code	Go		
#	Code	Name	Cost Center Code	Cost Center Owners	Status	Action
1	J0934	Jasper Marketing	23498	View (1)	Active	Edit Delete

Showing Page 1 of 1

Cost Centers

Edit Cost Center Import Cost Centers Via File

Unique Code is not editable.

Name*: Jasper Marketing	Unique Code*: J0934
Organization Units*: Organization Units selected	Cost Center Code*: 23498
Cost Center Owners: 1 Cost Center Owner Selected	ERP ID:
Description:	

2 Edit Dialog box open. Update the required fields.

3 Update Cost Center

How to Delete a Cost Center?

	Code	Name	Cost Center Code	Cost Center Owners	Status	Actions
	J0934	Jasper Marketing	23498	View (1)	Active	Edit Delete

Showing Page 1 of 1

1

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.

- For Selected: |

- To activate/deactivate individual cost center, use



Active



Inactive

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:

The image consists of two vertically stacked screenshots of a software application interface. The top screenshot shows a 'Collections' page with a sidebar containing various master data categories like Currencies, Countries, States, etc. An orange circle labeled '1' highlights the 'Add Collection' button. The main area shows a table of existing collections with columns for Status, Actions, and a search bar. The bottom screenshot shows a 'Create Collection' wizard with a title 'Create Collection'. It has fields for 'Collection Name *' and 'Form *'. An orange circle labeled '2' highlights the 'Collection Name' field, and another orange circle labeled '3' highlights the 'Configure' button. At the bottom are 'Submit', 'Save as Draft', and 'Cancel' buttons.

FlexiForm Studio

Configure Collection for Europe Clients

TMS Europe Clients Enter Description

Field Library

- iCost
- iManage
- iMine
- iMonitor
- iNotes_test
- iOptimize
- iPhoton
- iProduct
- iRequest
- iSave
- iSource
- iStar
- jim22
- Material Master

Custom Fields

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4 Enter a description if required.

5 Drag and drop the fields from field library

FlexiForm Studio

Configure Collection for Europe Clients

TMS Europe Clients Enter Description

Field Library

- dropbox
- Numericdat
- multilingualarea
- Textfielddat
- radio
- Employee Name
- Gender
- Reporting Manager
- Employee ID
- Release Descript...
- Release Number
- Release Number ...
- Release Name
- Product Details
- Price

Custom Fields

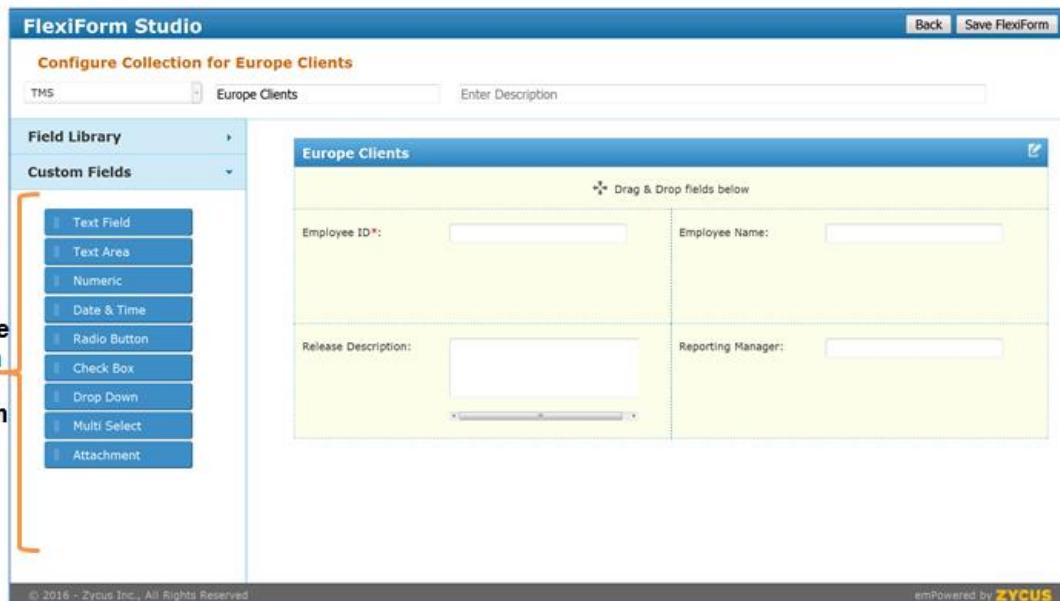
Employee ID*: Employee Name:

Release Description: Reporting Manager:

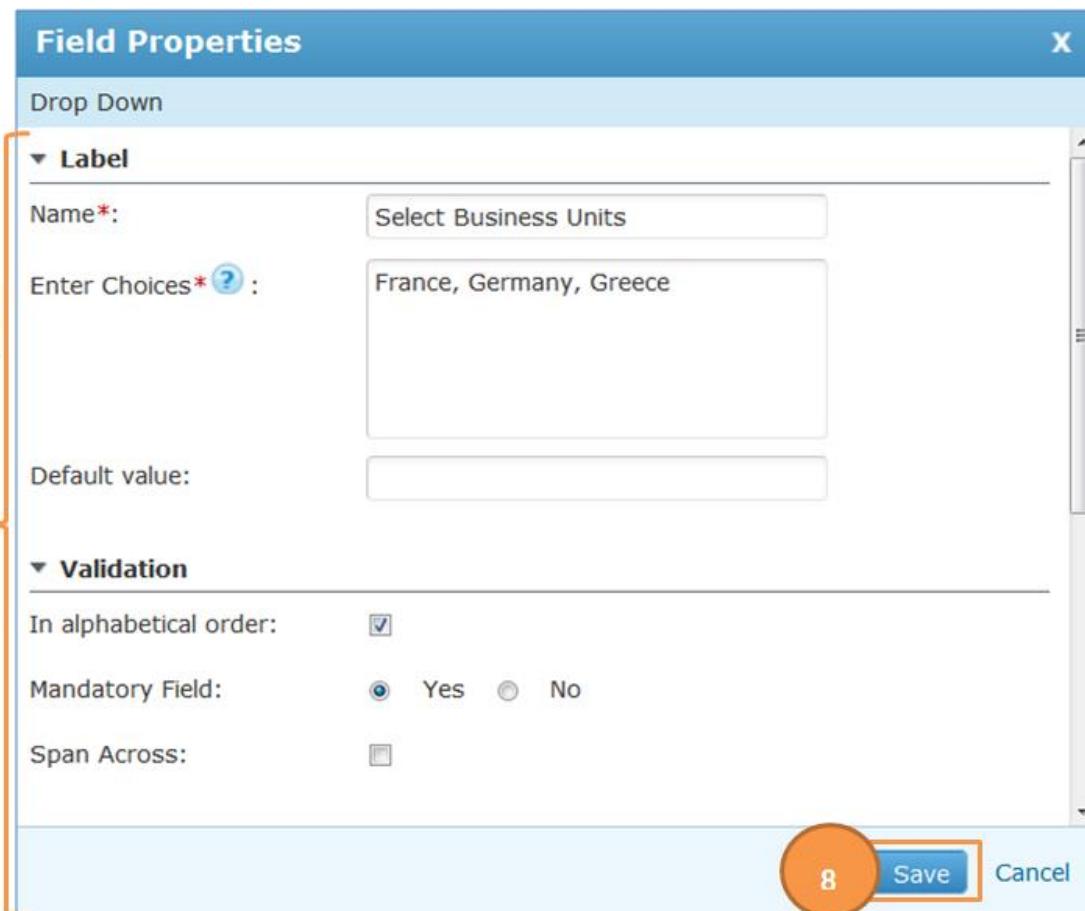
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6
You can also create your own custom fields from this side panel



7
When you drag a custom field, you will need to define the field properties



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

The screenshot shows the Zycus FlexiForm interface. At the top, there is a blue header bar with the 'Back' button and the 'Save FlexiForm' button, which is highlighted with an orange border and has the number '9' in a circle next to it. A note below the header says 'After you finalize your collection, save it.' In the main area, there is a yellow section titled 'Drag & Drop fields below'. Inside this section, there is a form field labeled 'Employee Name:' with a text input box. Below the main interface, there is a separate window titled 'Collections' with a 'Create Collection' section. It includes fields for 'Collection Name *' (set to 'Europe Clients') and 'Form *' (with a 'Configure' button). At the bottom of this window, there is a 'Submit' button highlighted with a red box and the number '10' in a circle, along with 'Save as Draft' and 'Cancel' buttons. The footer of the window contains the text '© 2010 Zycus Inc., All Rights Reserved' and 'empowered by ZYCUS'.

The screenshot shows the 'TE Connectivity Master' section with a sidebar containing 'Currencies', 'Countries', 'States', 'Units of Measure', 'Exchange Rates', and 'Regions'. The main area is titled 'Collections' and shows 'Total Records: 36'. A list of collections includes 'Europe Clients'. Below the list are buttons for 'Status', 'Actions', 'Active', 'Edit', and 'Add Entry'.

Newly added collection will be visible on the listings page.

How to Add an Entry in Collection?

The screenshot shows the 'TE Connectivity Master' section with a sidebar containing 'Currencies', 'Countries', 'States', 'Units of Measure', 'Exchange Rates', and 'Regions'. The main area is titled 'Collections' and shows 'Total Records: 36'. A list of collections includes 'Europe Clients'. Below the list are buttons for 'Status', 'Actions', 'Active', 'Edit', and 'Add Entry'. The 'Add Entry' button is highlighted with a red circle labeled '1'. The 'Submit' button on the form is highlighted with a red circle labeled '2'. A callout box points to the form fields with the text 'Enter details for all the fields in your collection'. The 'Entries for this Collection' section at the bottom shows a table with one row: Employee ID: 9087, Employee Name: Kate Mara, Release Description: New subscription form for 2016_Q2, Reporting Manager: Kevin Underwood. A red arrow points to the message 'Saved entry will be visible here'.

How to Deactivate a Collection?

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



Active

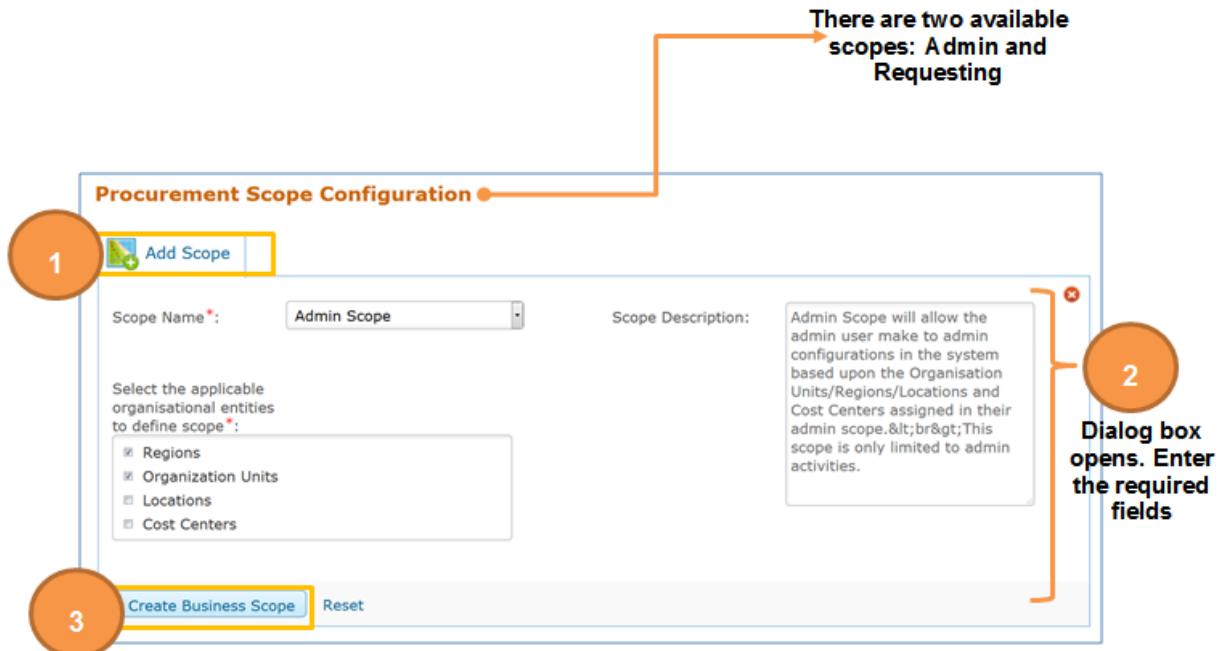


Inactive

- To activate/deactivate individual collection, use

Procurement Scope Configuration

How to Add Procurement Scope?



How to Edit Procurement Scope?

