Intelligent Enterprise Alliances

IENT™

Org Admin Guide

RRSSI

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Getting Started

Intelligent Enterprise Alliances (iENT) is an application developed by RR Software Solutions Inc. (RRSSI). iENT enables you to become an intelligent enterprise, by empowering your employees, customers, and partners with business workflow and automated supply chain solutions. iENT integrates innovative technology and flexible solutions with data and processes to enhance your value chain to grow more profitable.

Note: *This document applies to Org Admin (Buyer Administrators) only. From iENT release version 23.03, buyer admin is referred to as org admin. You may come across both the terms in the document.*

This document describes how buyers can administer all their tenant accounts. You can use this guide to understand the following features and modules:

- View and edit tenant details, roles, users.
- Create and manage organizations and locations.
- SMTP Mail configuration and email template management.
- Create and manage applications to optimize your portal experience.
- Configure global search categories for applications and modules.
- Create and configure global data modules.
- Install applications from the iENT Marketplace.
- View application analytics, and manage all your To do’s.
- Create and configure categories, divisions and regions for app management.
- Manage import and export of tenant data.
- Manage analytics data and customize your dashboard view.
- View audit logs.
- Create and manage page schemas.
- Manage Bulletins.

- Work with Demand Change App.

Prerequisites: *In order to be able to log in as an org admin (buyer administrator), contact the iENT super administrator to ensure that a tenant account has been created for your organization.*

Information:
- *For all support related communication please use support@rrssi.com.*
- *You can contact us at rrssi.com/contacts or email us at contact@rrssi.com.*

This section guides you through the following fundamental features that will help you get started with iENT:
- **Login**
- **Login as Global User**
- **Homepage**
- **Navigation Toolbar**
- **Choose Your Preferred Language**
- **Notifications**
- **Contact Support**
- **To Do's**
- **Global Search**

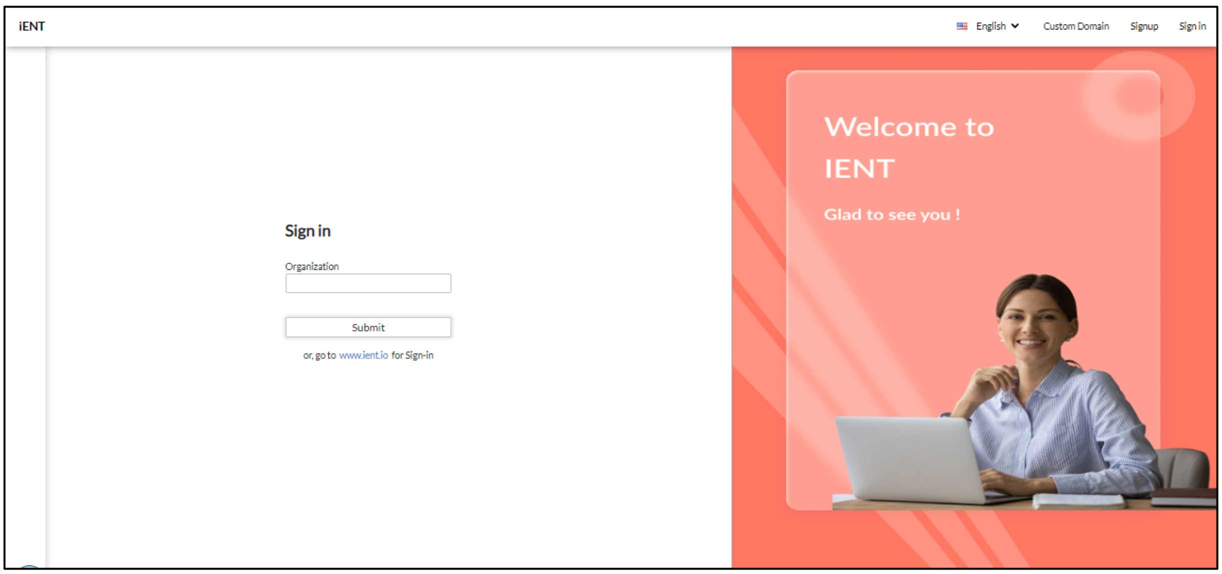
Login

You can login using any of the **Custom Domain** and **Login** buttons on the top right corner of the iENT homepage. The following steps explain login using both the **Custom Domain** and **Login** buttons.

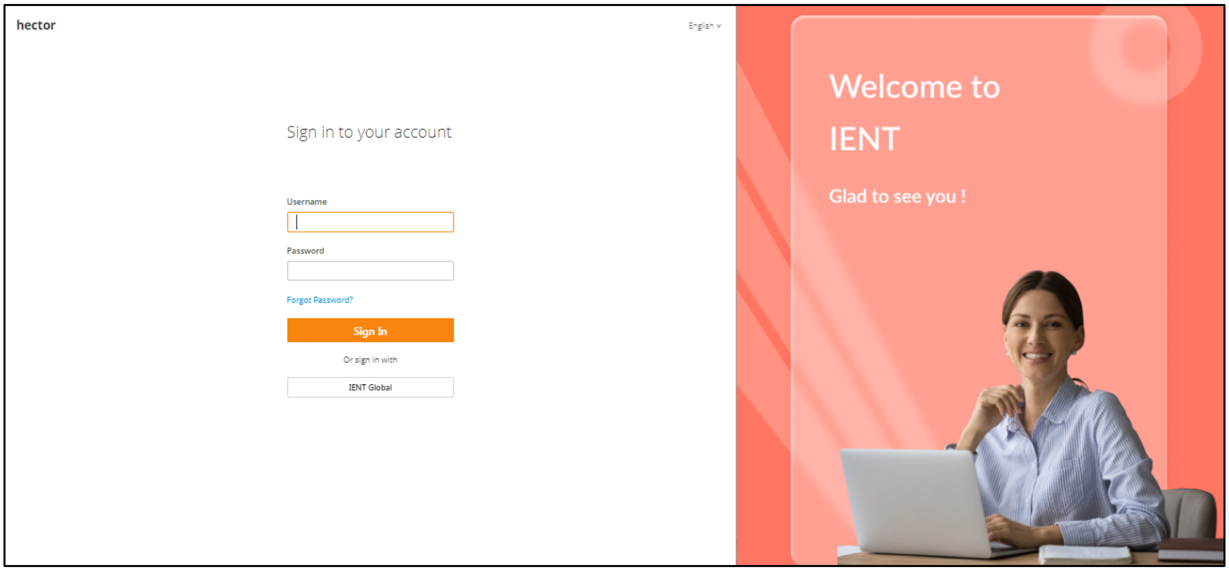
To log in to the iENT application:

1. Open the iENT **homepage**.

2. Click the **Sign in** button.



3. Enter your organization's name (If organization name is not correct, the following message is displayed).
   '*Organization information not available, please try again*'
4. Click the **Submit** button.



The login page with the organization’s name is displayed (Here, hector is displayed as an example; your organization name will be displayed after tenant is set up during your organization’s on boarding with iENT).

5. Enter your *username* and *password,* and click on **Sign In**.
   Note: Users logging in as global user, click the **IENT Global** link. *Next section* describes how the global users log in.

   Keycloak uses several authentication provider options. *Ariba Suppliers* can use the **Ariba Supplier SSO** option to access the iENT application. See here for more details on Ariba SSO Configuration.

   After you log off, it leads to the organization’s portal landing page.

The page has navigation link to the **IENT home** or you can login back using the **Sign in** button on the top right corner.
Note: Clicking this **Sign in** button will prompt you to enter the username and password without asking for the organization name.

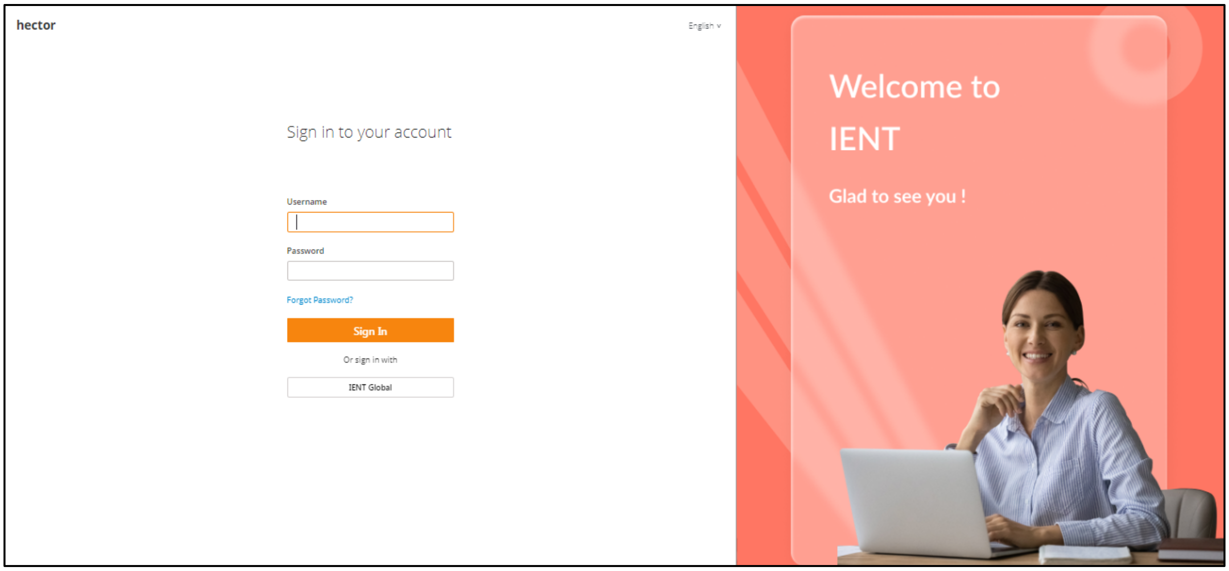
Login Using the Custom Domain Button

1. Open the iENT homepage.

2. Click the **Custom Domain** button.

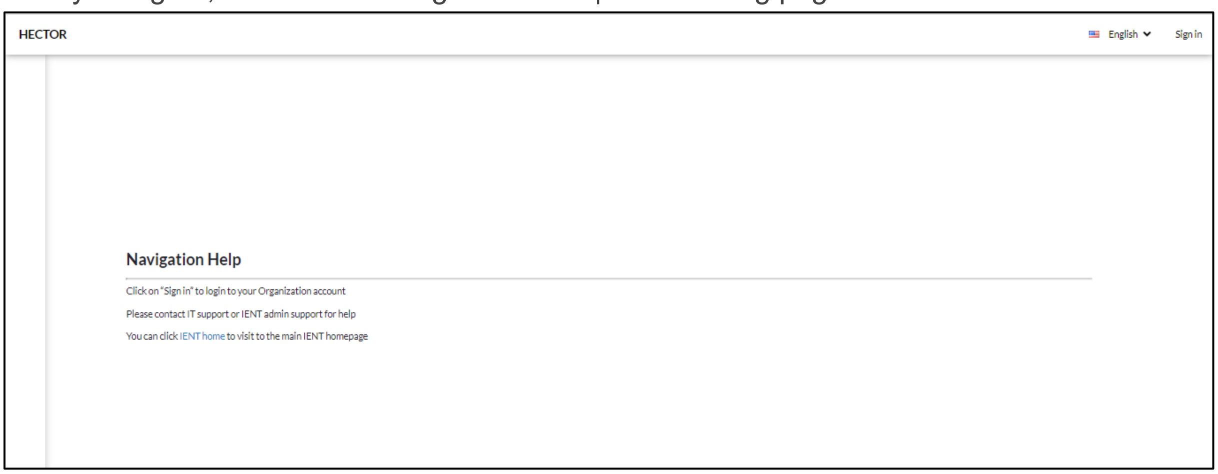
3. Enter your organization's name and click  (If organization name is not correct, the following message is displayed).
   '*Organization information not available, please try again*'
   The organization's portal landing page is displayed.

4. Click the **Sign in** button.



5. Enter your *username* and *password,* and click on **Sign In**.

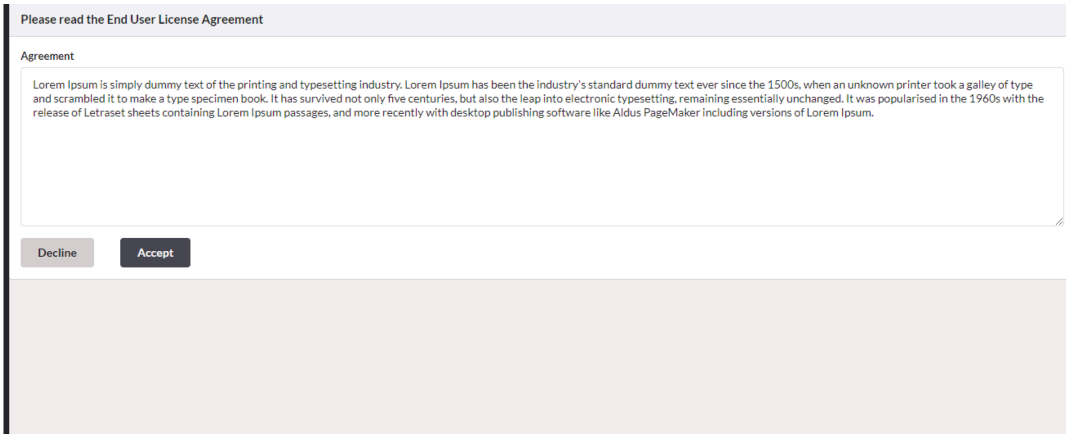
   After you log off, it leads to the organization's portal landing page.



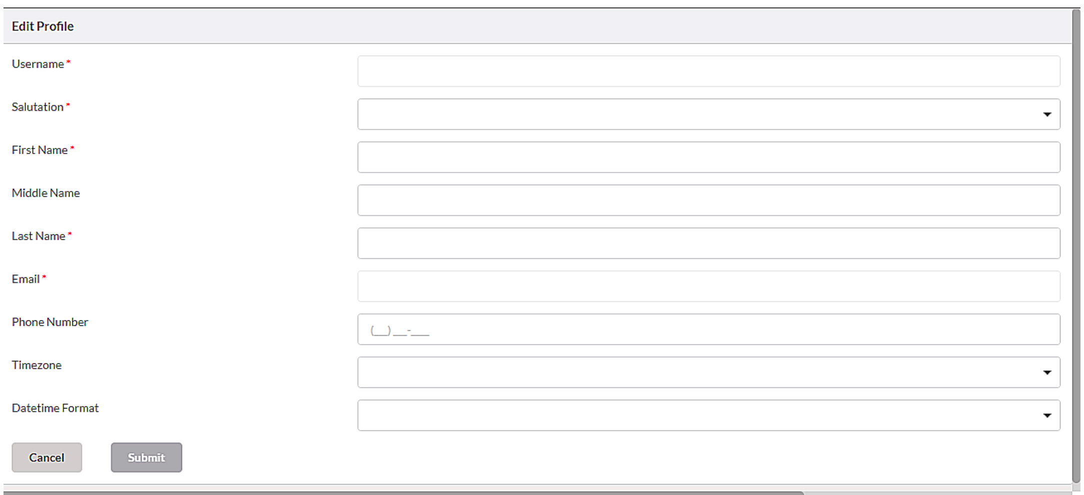
The page has navigation link to the **IENT home** or you can login back using the **Sign in** button on the top right corner.
Note: Clicking this **Sign in** button will prompt you to enter the username and password without asking for the organization name.

New User Login

If you are logging in for the first time as a buyer user, you will be prompted to read the **End User License Agreement (EULA)**.



Once you read and accept the EULA, you will be directed to your **User Profile,** to edit and update your user details.

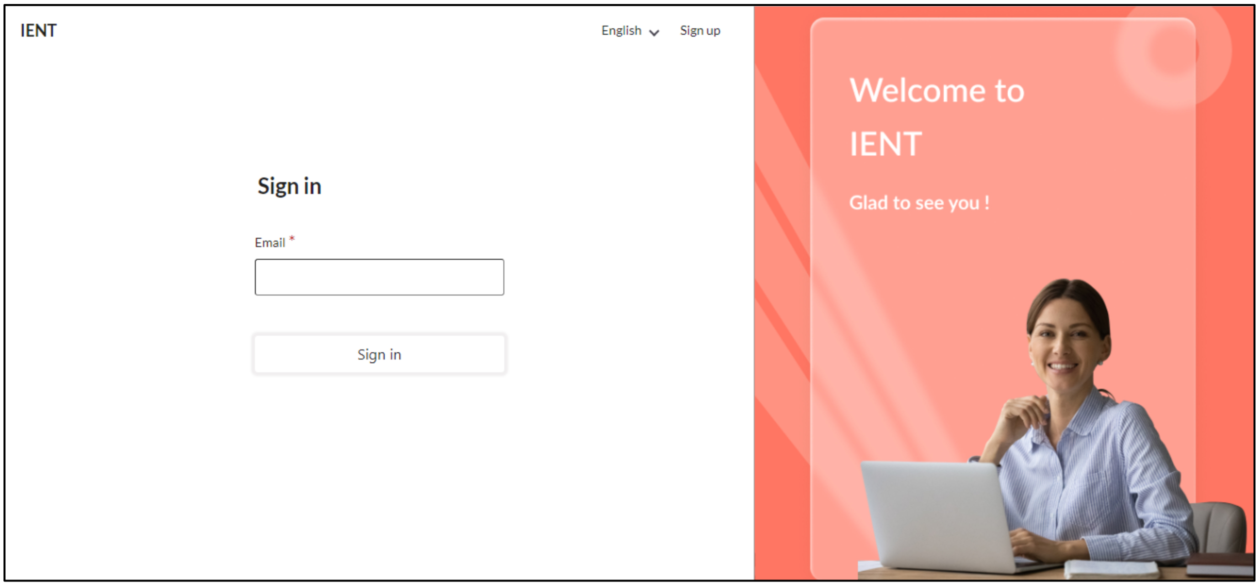


Login as Global User

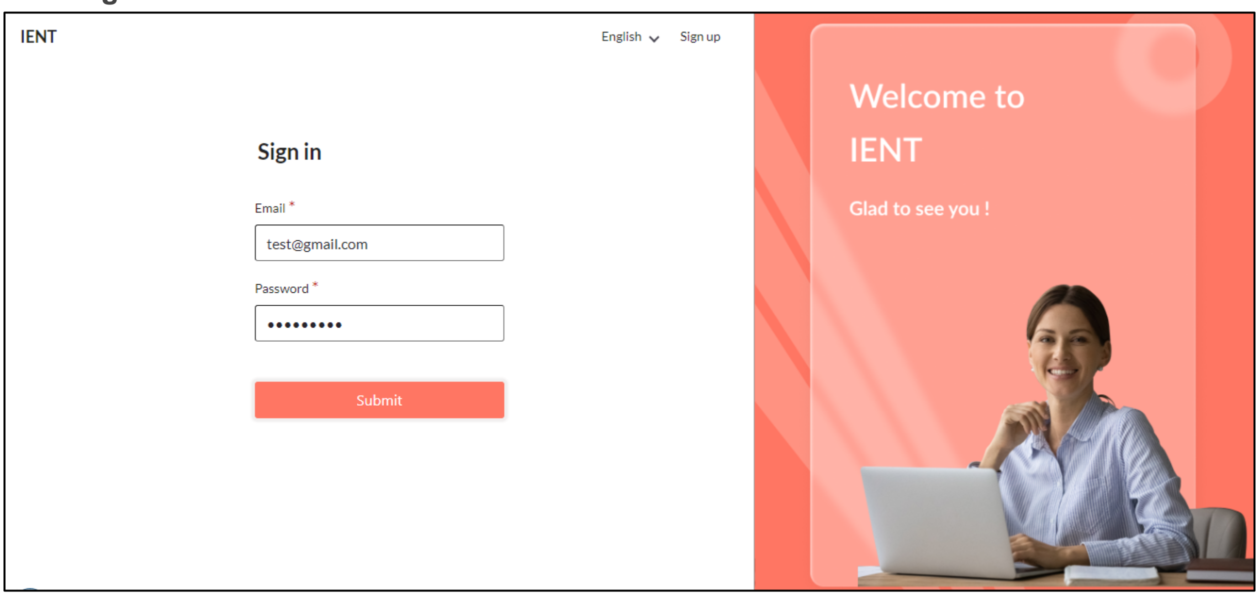
As a global user you can login in the iENT application and select an organization from the list of available organizations that has user account for the Global User. Once logged in, the global user can switch between the organizations without logging out from the iENT application.

To log in to the iENT application:

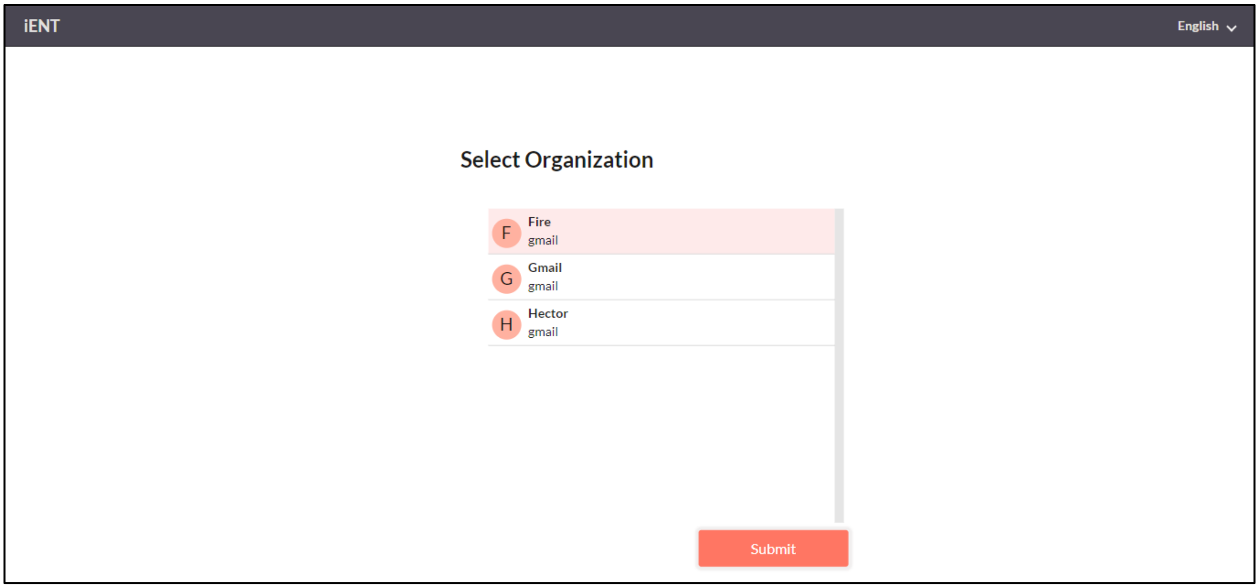
1. Open the iENT homepage (https://in01.ient.io/signin).



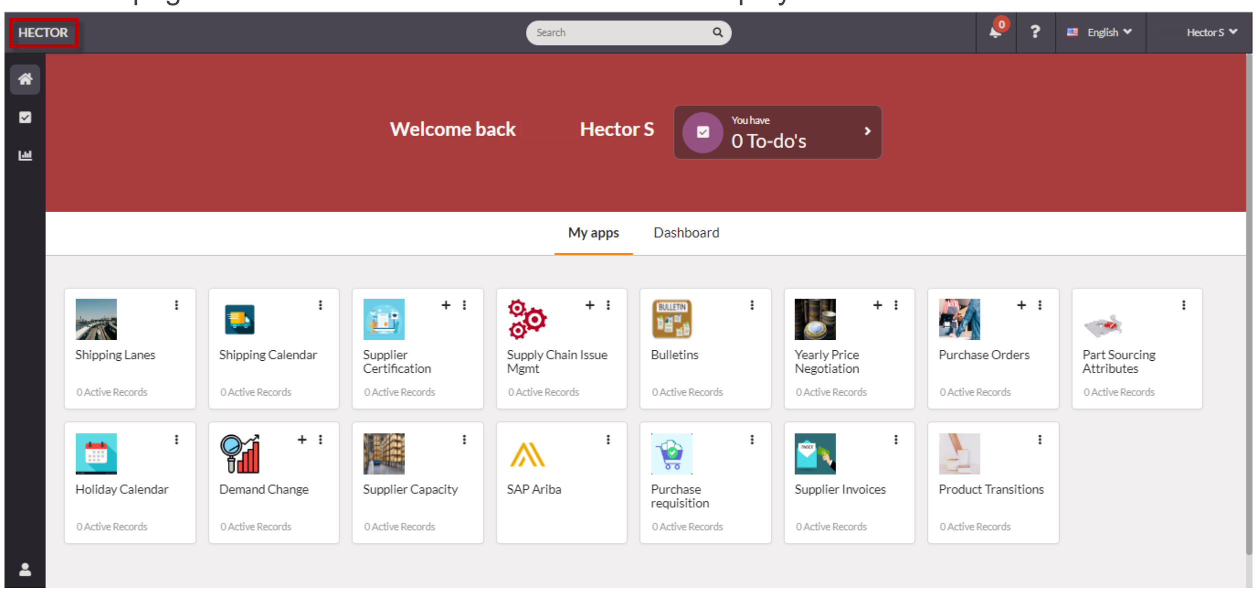
2. Enter the email id associated with the global user account.
3. Click **Sign in**.



4. Enter the password associated with the user account.
5. Click **Submit**.
   The list of organizations (tenants) associated with the global user is displayed.

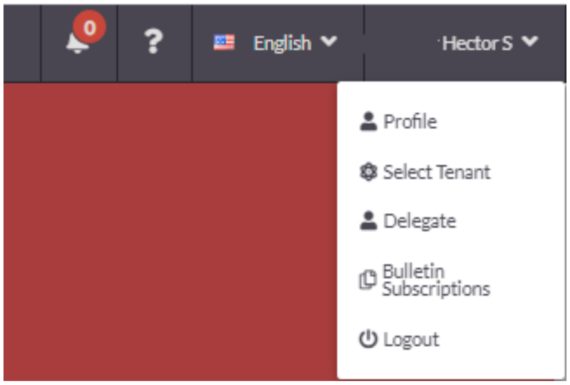


6. Select the required tenant and click **Submit**.
   The homepage associated with the selected tenant is displayed.



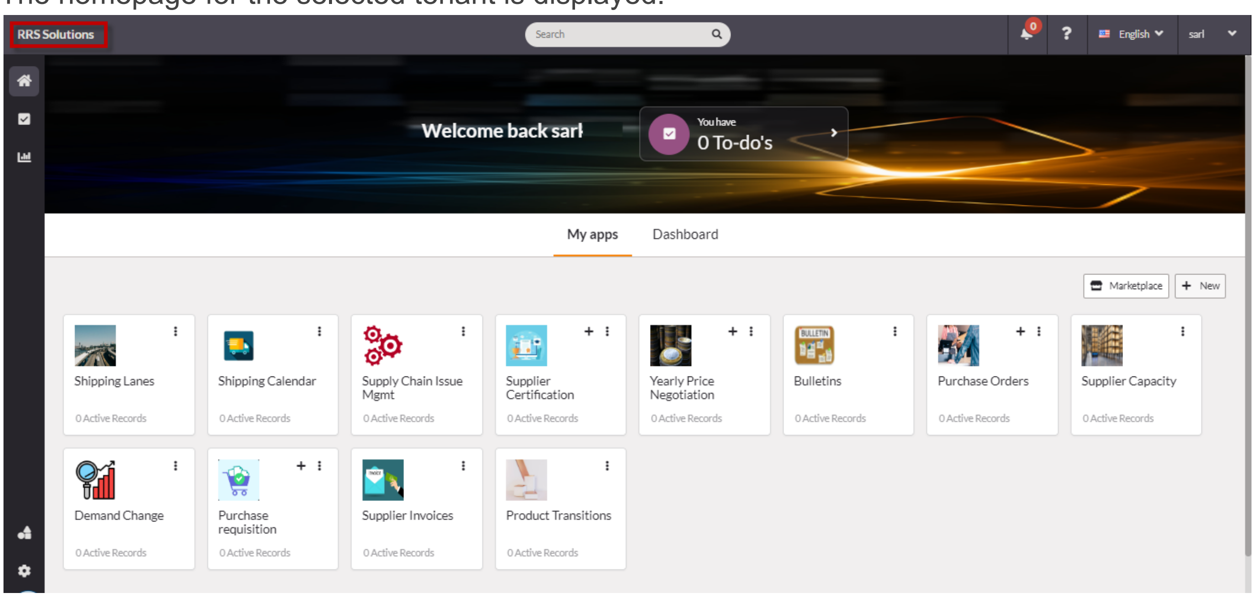
Note: The tenant's name is displayed on the top left corner of the screen.

7. To select a different tenant, click the user name on the top right corner of the screen and click **Select Tenant**.



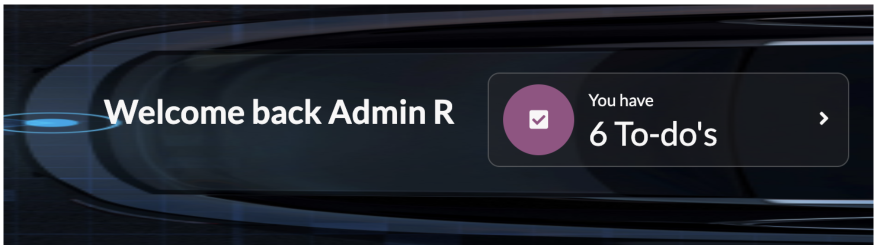
The list of tenants associated with the global user is displayed.

8. Select the tenant and click **Submit**.
   The homepage for the selected tenant is displayed.



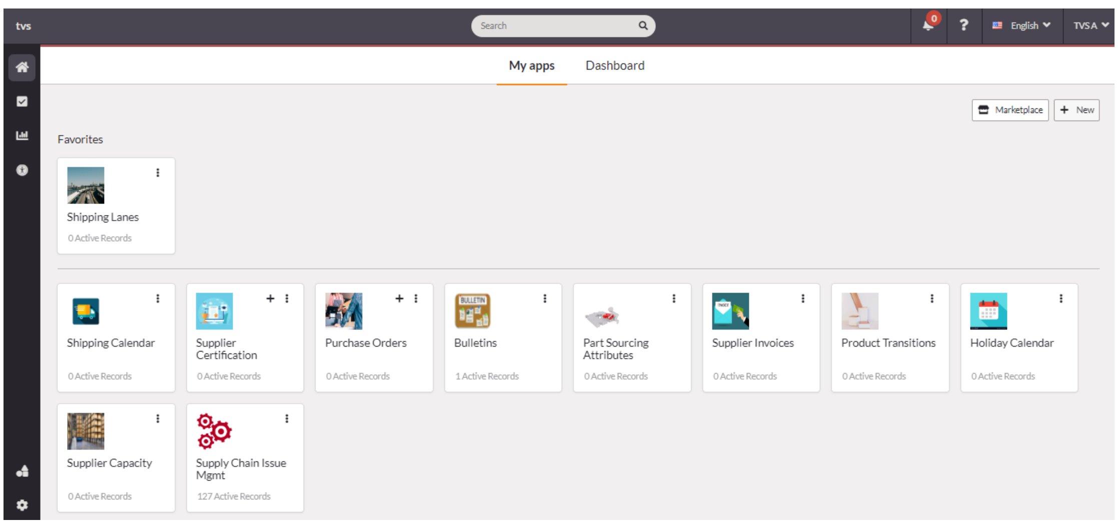
Homepage

On successfully logging in, you will first be directed to the iENT homepage.
In the header section, you will be prompted by the number of pending **To-do's** that you have. Click on this button to redirect you to the **To-do's** page to manage all your cases.



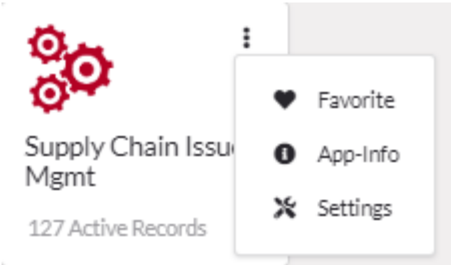
My Apps

Below the header, you will be able to view and access all your installed apps. All your favorite apps will be listed out on the top of the screen.

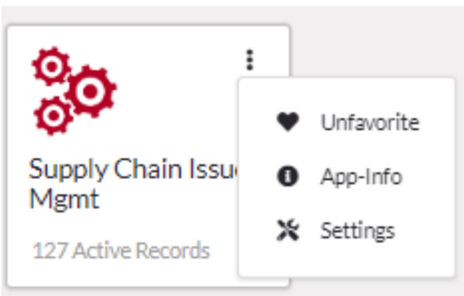


Favorite Apps

To mark any of your apps as a *favorite*, click on the kebab menu on the selected app, and click on **Favorite**.

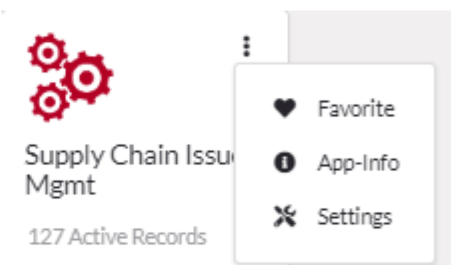


To *unfavorite* any of your apps on the dashboard, click on the kebab menu on the selected app, and click on **Unfavorite.**



App Info

To view the App information of any app on your dashboard, click on the kebab menu on the selected app, and click on **App info**.

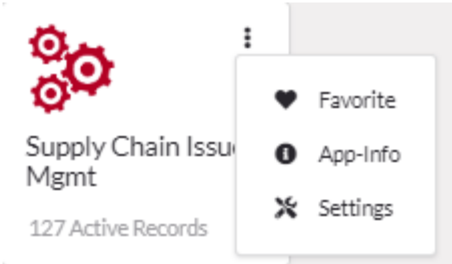


Click on the **Marketplace** button to navigate to the applications' marketplace.
Note: *See Marketplace for more details.*

Click on **+ New** to create a new app.
Note: *See Create New Applications for more details.*

Settings

To view the existing app settings or update the settings, click on the kebab menu on the selected app, and click on **Settings**.

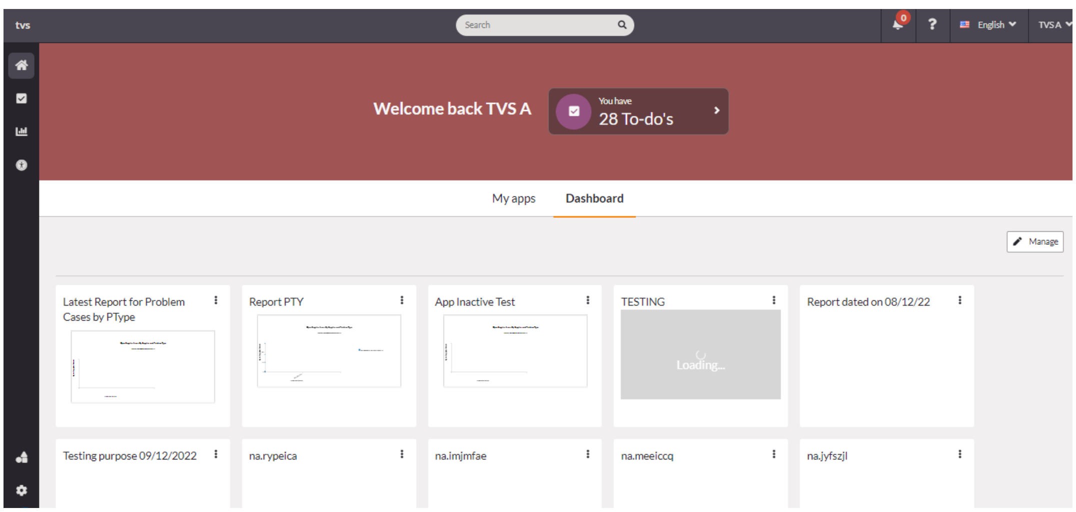


Note: *See Edit Application for more details.*

Dashboard

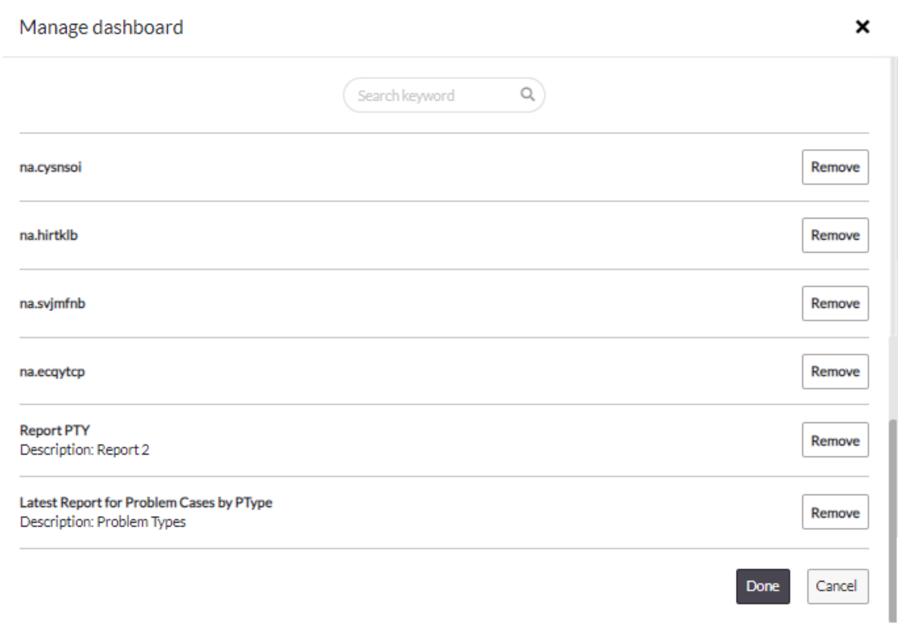
You can easily view frequently used analytics and reports by pinning them on to your dashboard. You can customize the contents of your dashboard to help you quickly access analytical content as required by you.

On the homepage, below the header, you can navigate to your **dashboard** and see all your analytics' widgets.

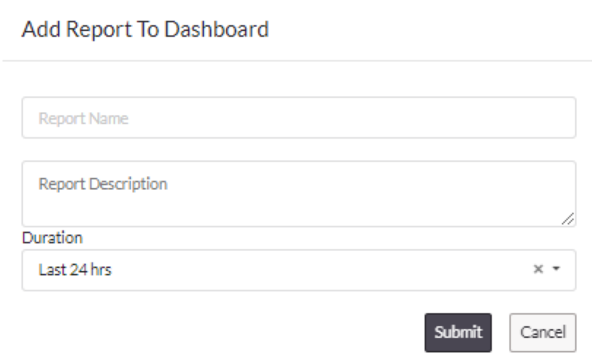


You can perform the following operations:

- Add report(s) to the dashboard with different configurations.
- Update the report conditions for the existing dashboard reports.
- Manage the report(s) added to the dashboard (add/remove) by clicking on the **Manage** button.



- Delete the report added to the dashboard by clicking on **Delete** from the kebab menu.
- Refresh the report to load the latest data by clicking on **Refresh** from the kebab menu.
- View detailed reports by clicking on the dashboard report cards or selecting **View** from the kebab menu.
- Search the dashboard using keywords, to view a specific report.
- You can pin reports to the dashboard by clicking on the Pin **To Dashboard** button from the Report Viewer by providing minimal information such as *Report Name*, *Description,* and *Duration*. You have the option to add multiple reports to your dashboard with different conditions.



Navigation Toolbar

You can use the navigation toolbar on the left side of the screen to move around the iENT Application.

- **Home:** Click on the icon to take you to the iENT home screen.
- **To-do's:** Click on the icon to view and manage your To-do's.
- **Analytics:** Click on the icon to view and manage all your application analytics.
- **Project:** Click on the icon to view and manage all your applications.
- **Settings:** Click on the icon to view and manage all the administration modules that are available to you.

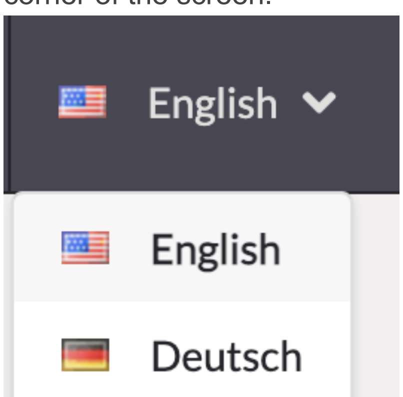
You can customize the navigation toolbar via the Portal Configuration module.

Choose Your Preferred Language

iENT enables the internationalization of the application, wherein you may change the language used in the application without making any engineering changes. This allows users to localize the application to make it easier for users in different regions across the world.

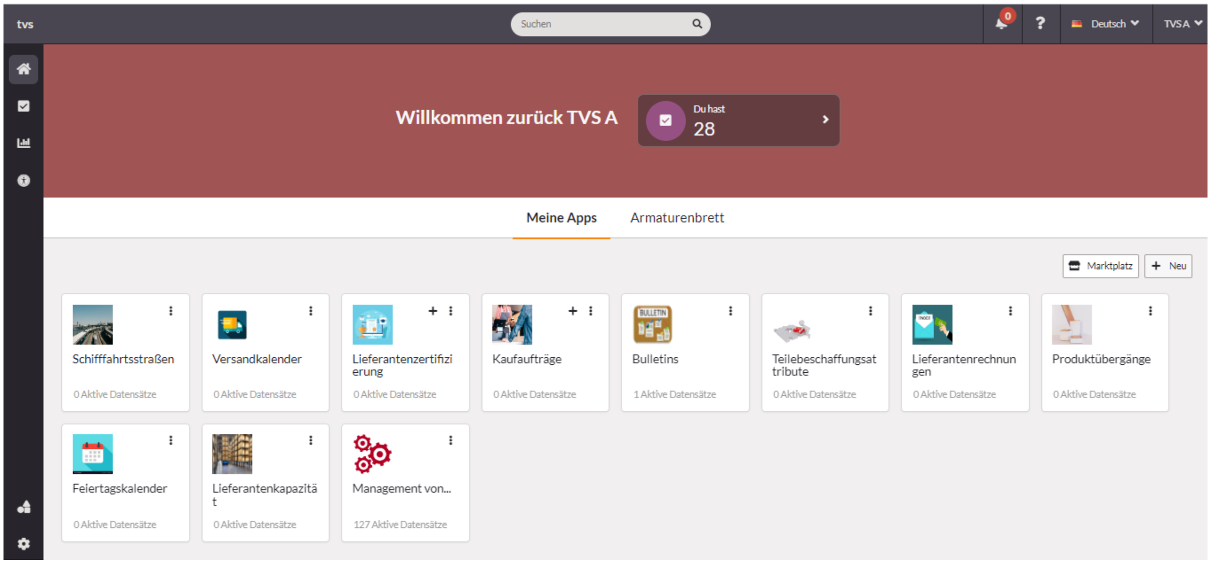
There are different ways by which you can set your language preferences:

- By default, the application will open in the language that is set as your browser's default language.
- You may also set your preferred language by appending the language code to the application URL.
  Example: dev.app2.ient.io/en-US
- To change your language preferences on the iENT portal:
  a. Login to the iENT Application.
  b. On the toolbar of the application, click on your current *language* on the right corner of the screen.



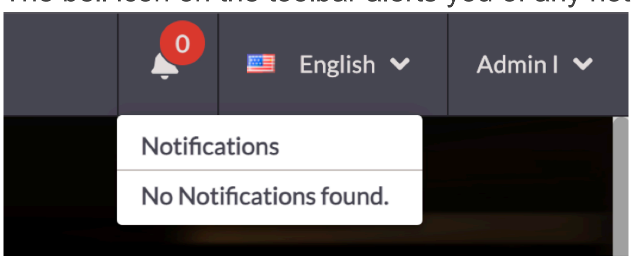
  c. From the dropdown, select your preferred language.

You will then be able to use the application in your preferred language.



Notifications

The bell icon on the toolbar alerts you of any notifications that you receive.

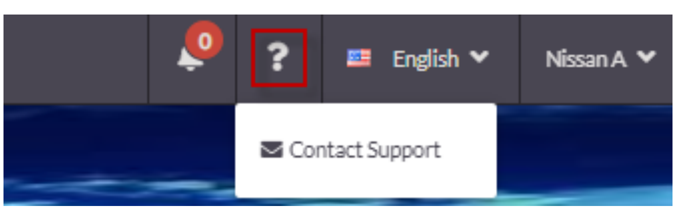


The badge count on the icon will display the number of notifications that you have.
When you click on the bell icon, it will display the top 5 notifications as well as a *View All* option.

- Clicking on any notification will redirect you to the selected task page, and remove said task from the notification count.
- Clicking on **View All** redirects you to the **To-Do's** page, and renders all your notifications as *read*.

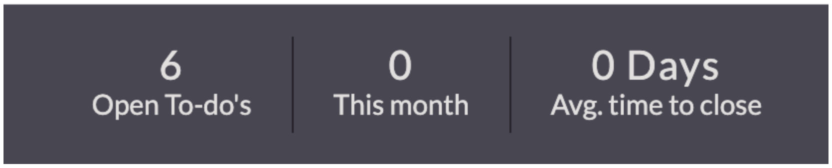
Contact Support

To contact iENT support through email, click  on the iENT homepage.



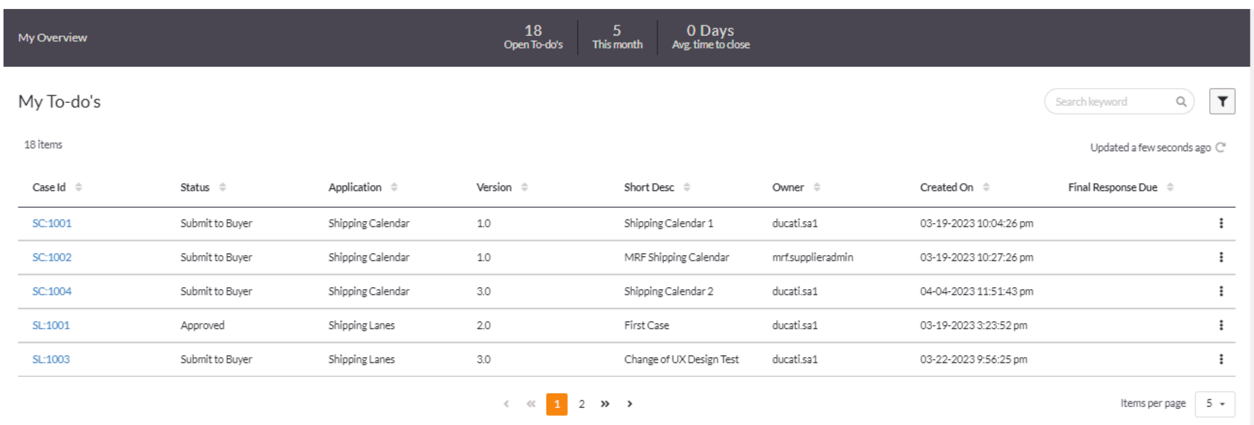
To Do’s

iENT compiles all your tasks and their details in the To Do’s page of the application. When you navigate to the To Do’s page, you will be able to view your **Key Performance Indicators (KPIs)** with the following information:



- **Open To-do's:** Displays the count of total action items available for you.
- **This month:** Displays the count of your total action items available for the current month (starting from 1st date of the current month to current date).
- **Average time to close:** Displays the time (in Days), on average, taken by the user to respond to tasks assigned.

Below the KPI overview, you will be able to view all To Do items that can be further filtered based on *application*. By default, the page displays all your assigned tasks that are available to you.



The following information of all your tasks is displayed:

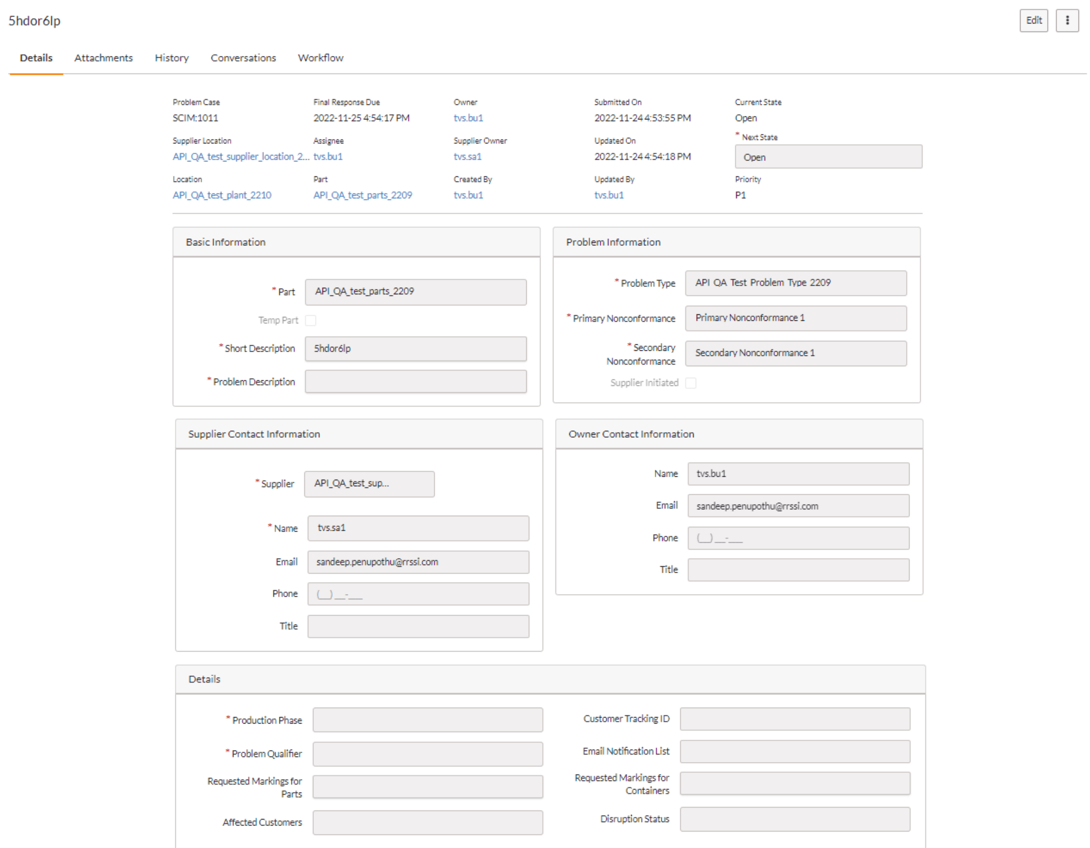
- **Case ID**
- **Status**
- **Application**
- **Version**
- **Description**
- **Owner**
- **Created On**
- **Final Response Due**

You can **Search** through all the items via *Case ID* and *Owner* by entering a keyword in the Search bar.

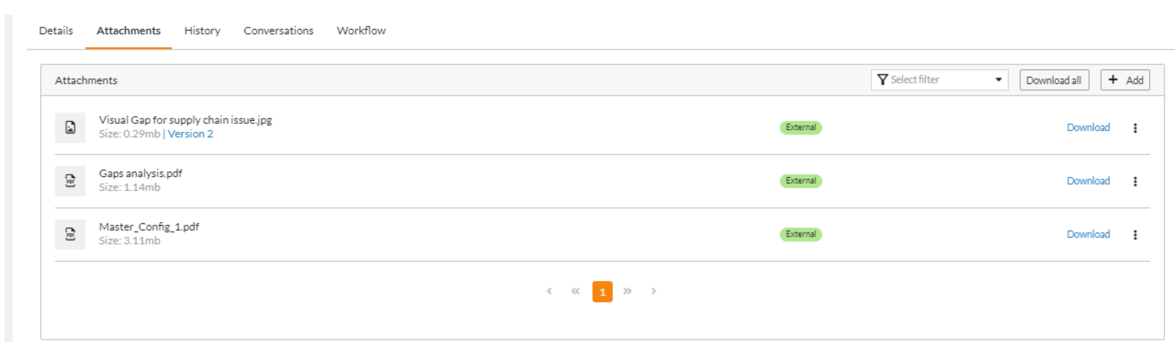
You can also filter the records by application using .

Clicking on any case will open the case in the read-only mode. You will be able to view the following information:

- **Details:** You will be able to edit details of the task by clicking on the **Edit** button.



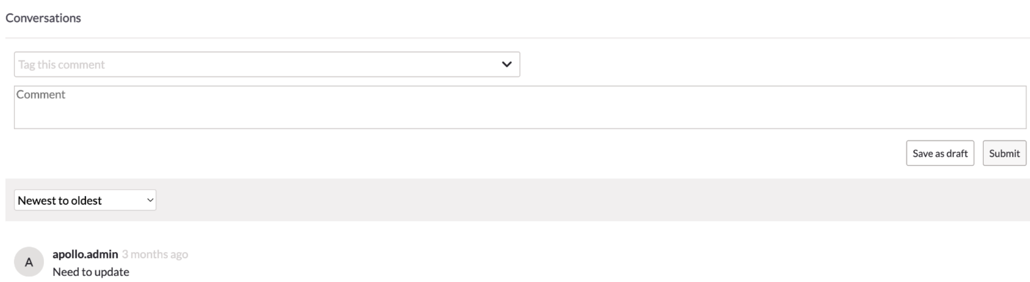
- **Attachments:** You add attachments to the case by clicking on the **Add** button.



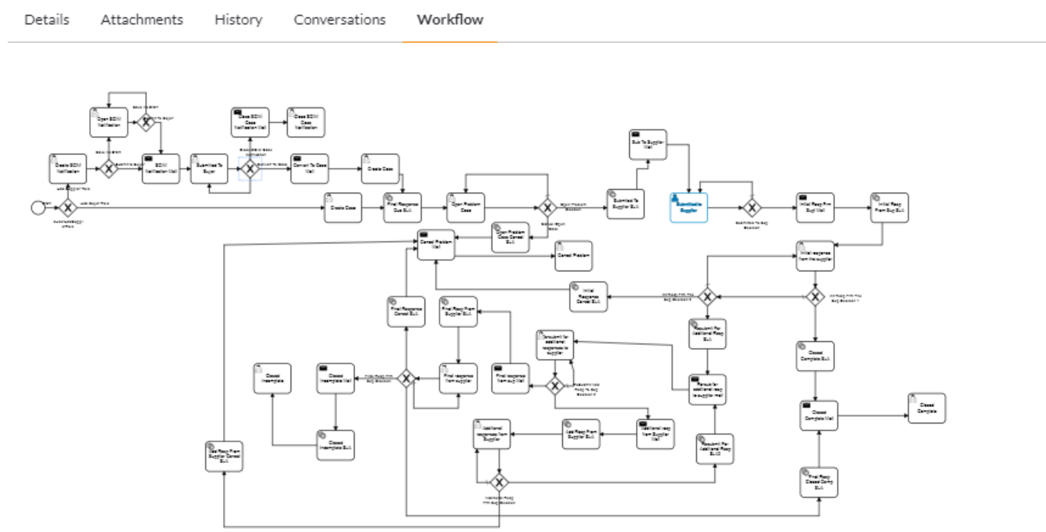
The filter option allows you to filter the attachments based on tags.
The **Download all** option downloads all the attachments in single ZIP file with tag name as folder name containing the corresponding file.

- **History:** Select the history tab to view the past activities pertaining to the task.

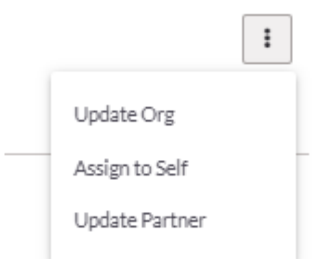
- **Conversations:** All communication pertaining to this task can be found in this tab. You can add to the conversation by entering a comment and clicking on **Submit**.



- **Workflow:** You can view the workflow of the task to track the flow of activities accordingly.

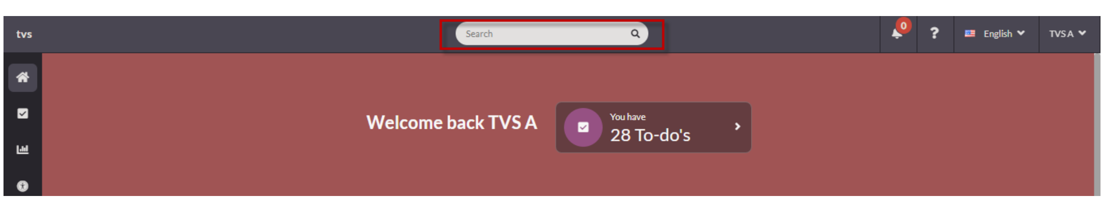


If applicable for the app, you will also be able to update the *Org* or *Partner* on the task or assign it to self by clicking on the kebab menu on the **Details** section.



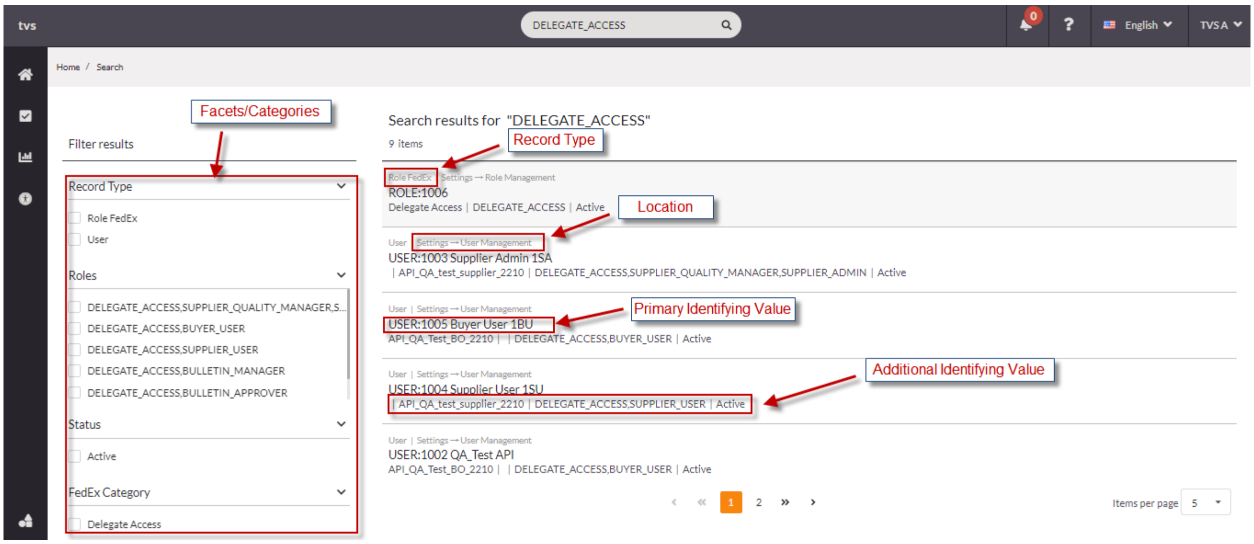
Global Search

On the tool bar, you will be able to see a search box. It is the global search tool which is present on all the screens in the iENT application. It allows you to perform a search globally and data is displayed from all the iENT applications (except URL apps) and modules that user has access to. The search will display the records or data for which the user performing the search is authorized to view/access.



On clicking the search box, the last five searched terms (if any previous search was performed) will be listed and when you start typing, the search ahead terms as per your input will be listed. On selection of any of the suggested terms, search results will be displayed.

The following screen displays the search performed for the term **delegate access**.



The screen displays the results organized as record type, where it is located and primary and additional identifying values of the records. The facets/categories on the left pane allow further filtering of the search results as required. User can select multiple facets/categories and the search results updates accordingly. You can clear all filters with **Clear all** link.

The Org Admin (Buyer Admin) has to maintain the global search configuration for each application (transactional data) and module (master data) and accordingly the global search performs the search query.
The configuration of applications and modules for global search are explained in the sections Global Search Configuration for App and Global Search Configuration for Modules.
Note: When any data from an app or a module is exported to a particular tenant, corresponding global search configuration is also exported by default.

Basic Configuration

When an organization has been onboarded to the iENT Application, the iENT Super Admin can assign one of the tenant users as the buyer administrator. The Buyer Administrator role is ideally assigned to that individual at your organization who is responsible for setting configuration options, managing supplier relationships and contacts, and maintaining the account over time. The buyer administrator serves as the primary point of contact for users with tenant queries and issues. As the buyer administrator, you can control who can access your tenant account and which areas of the service each user can access. To do this, you create roles and then add users. As a best practice, create roles that reflect the way your company does business to prevent confusion for your account users and maximize the efficiency of your team once roles are in place.

Note: Only one user in the organization can be assigned the Administrator role.

This section will help you set up basic iENT features such as configuring your email settings, adding email templates, managing roles, and users, and updating your organizational information. These configurations are required to enable smooth functioning of the portal. In this section, we will discuss how to create the different business organizations under your tenancy along with the several locations and sub-organizations that go under them. You will be able to link all your divisions and locations to their respective organizations as needed.

This section guides you through the following features:

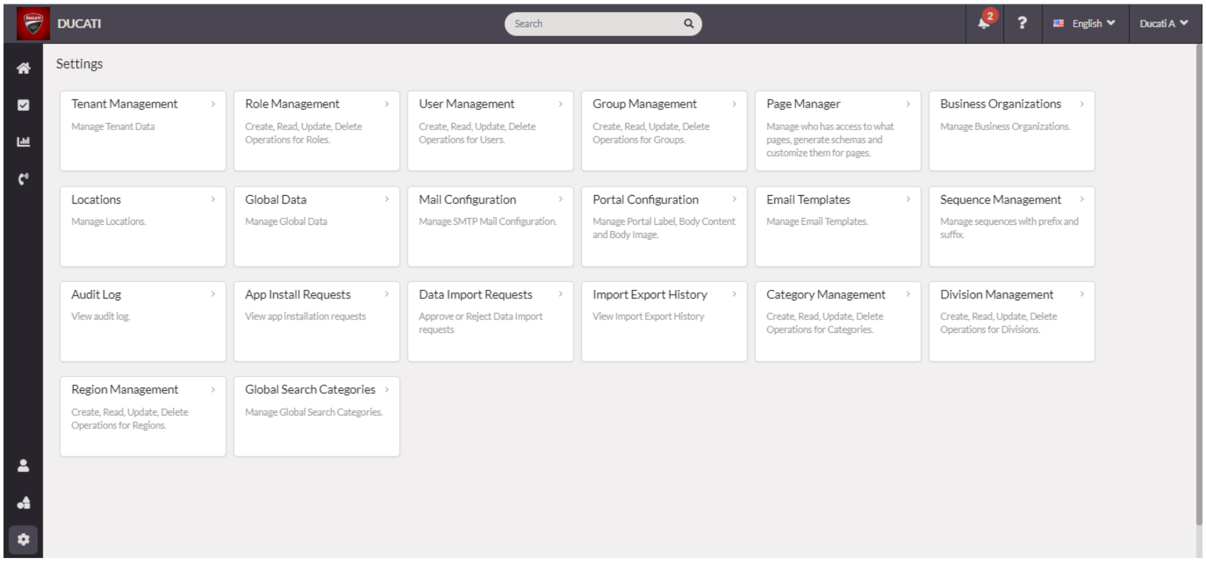
- **Mail Configuration**
- **Email Templates**
- **Business Organization**
- **Locations**
- **Role Management**
- **User Management**
- **Group Management**
- **Category Management**
- **Division Management**
- **Region Management**

Mail Configuration

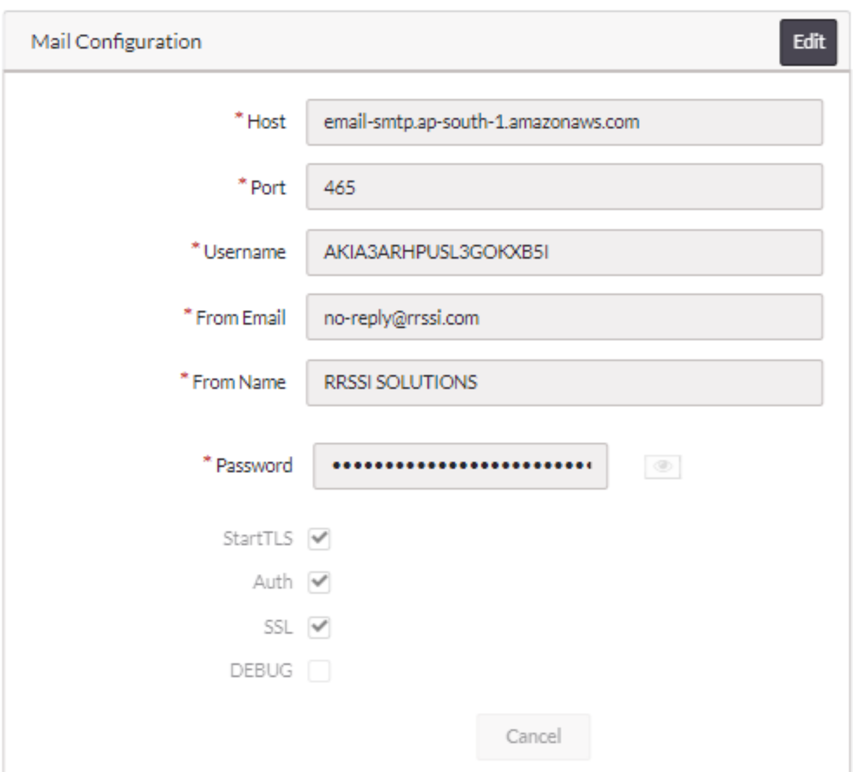
The iENT application uses standard Simple Mail Transfer Protocol (SMTP) to route your emails. You can view and manage your mail settings to enable you to send emails. As the Buyer Administrator, you can use your organization’s existing email server or account. You can also use SMTP settings from any bulk email providers such as *Amazon SES, Mailchimp, etc.*

To view and edit your mail configuration details:

1. Login to the iENT Application.
2. Go to **Settings > Mail Configuration**.



This will direct you to the mail configuration details page.



3. To change these details, click on the **Edit** button on the top right corner. This will reload the page in *edit mode*. The following mail configuration details can be updated:
    - **Host:** This is the name of your mail server host.
      Note:This is a mandatory field.
    - **Port:** This is the SMTP port number.
      Note:This is a mandatory field.
    - **Username:** This is the username used to access your emails.
      Note:This is a mandatory field.
    - **From Email:** This is the email ID from which your emails are sent.
      Note:This is a mandatory field.
    - **From Name:** This is the name of the person sending the email.
      Note:This is a mandatory field.
    - **Password:** This is to set a user password to access your email. You can click on the button to expose your typed password.
      Note:This is a mandatory field.
    - **StartTLS:** Selecting this option will set the email protocol command to mail.smtp.starttls.enable. This informs an email client to turn an insecure connection into a secure one.
    - **Auth:** Selecting this option will set the email protocol command to mail.smtp.smtp.auth. This provides an authentication service to the client.
    - **SSL:** Selecting this option will set the email protocol command to mail.smtp.ssl.enable. This protocol establishes secure links through encryption and authentication.
    - **Debug:** Selecting this option will enable the logging of debugging information in the system.
4. Click on **Submit**.

Note: The changes effected in the mail configuration by *Buyer Admin* automatically get updated in the Keycloak realm.

Email Templates

An email template is a pre-formatted email that you can use to send emails quickly and easily. You can use this feature to standardize your communication, ensure consistency and enhance productivity. The following features are available for email templates:

- Create Email Templates
- Delete an Email Template
- Download Email Templates
- Export Email Templates

For smooth functioning of a tenant, some mandatory templates will be provided. Some of these templates are:

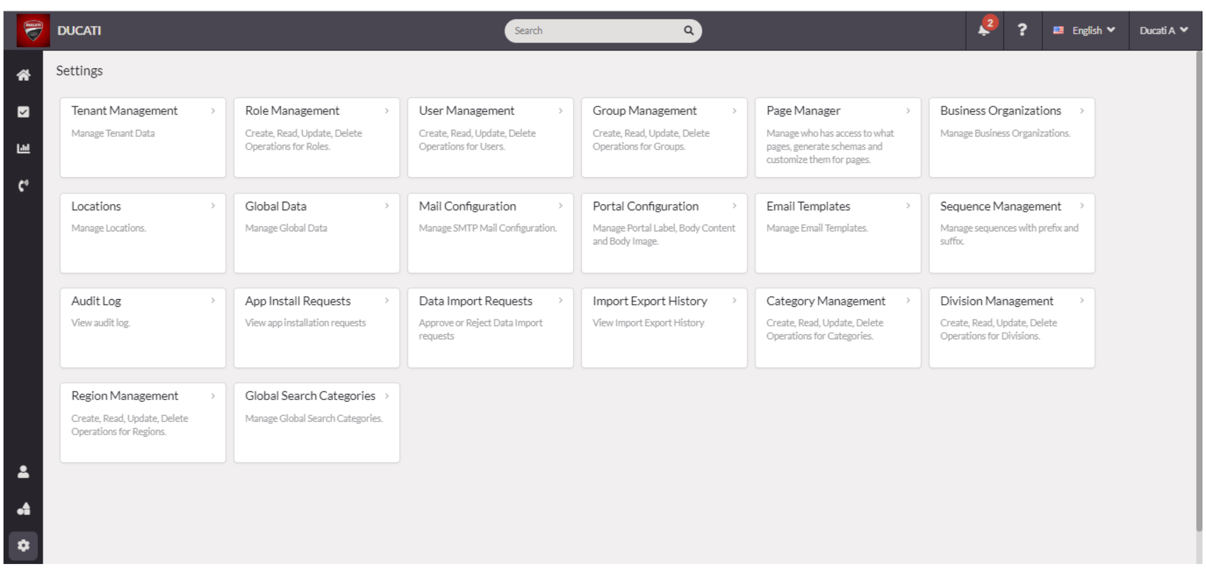
- ASSIGN_USER_EMAIL_TEMPLATE Problem Case Assigned
- DELEGATE_EMAIL_TEMPLATE Delegate Access
- END_DELEGATE_EMAIL_TEMPLATE End Delegate Access
- EXPORT_EMAIL_TEMPLATE_FAILURE Import Tenant Data Failed
- EXPORT_EMAIL_TEMPLATE_SUCCESS Imported Tenant Data Successfully
- IMPORT_REQUEST_APPROVED_TEMPLATE Data Import Request Approved
- IMPORT_REQUEST_REJECT_TEMPLATE Data Import Request Rejected
- IMPORT_REQUEST_TEMPLATE Data Import Request Received
- KEYCLOAK_USER_EMAIL_TEMPLATE KeyCloak User Created
- OWNER_USER_EMAIL_TEMPLATE Problem Case Ownership
- SUPPLIER_USER_EMAIL_TEMPLATE Supplier name changed
- USER_EMAIL_TEMPLATE User Created

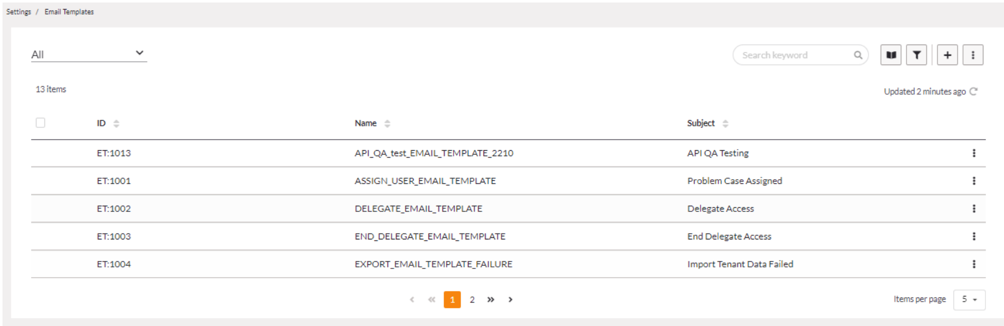
Create Email Templates

Other than the existing email templates, you can further create your own email templates and share them with other tenants within your organization.

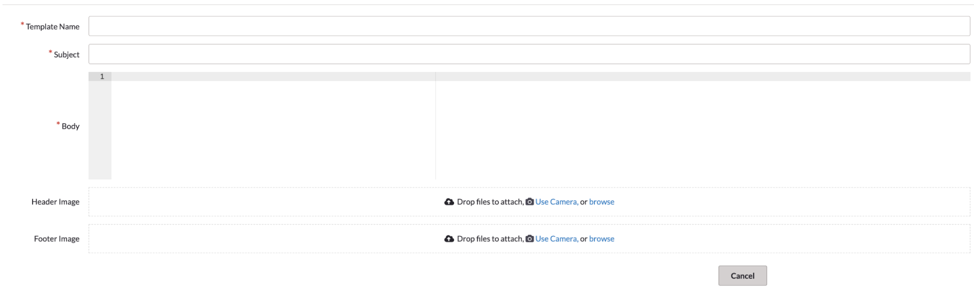
To create a new email template:

1. Login to the iENT Application.
2. Click on **Settings > Email Templates**.





3. Click on the **+** button on the top right corner.



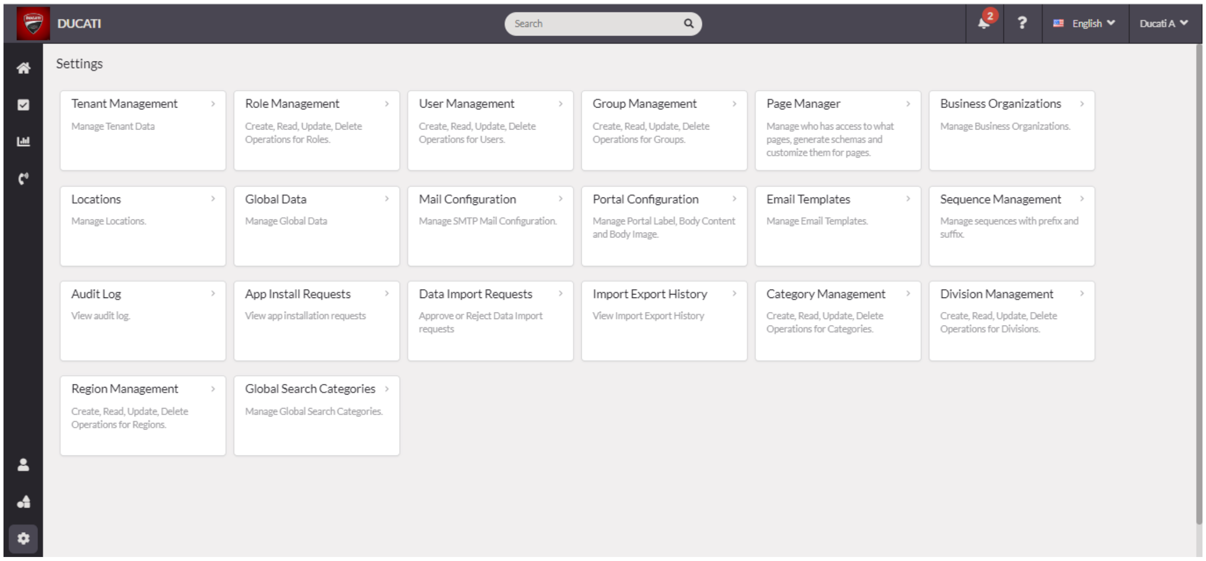
4. Update the following details of your template:
   - **Template Name:** Give the new template a name.
     Note:This is a mandatory field.
   - **Subject:** Add an email subject to your template
     Note:This is a mandatory field.
   - **Body:** Add the body content to your email template. You can use **${}** to incorporate variables into the content (*Example: ${username}*).
     Note:This is a mandatory field.
   - **Header Image:** You can upload an image for your email's header.
   - **Footer Image:** You can upload an image for your email's footer.
5. Click on **Submit.**

Note: To configure the global search configuration for the email template, click **Config** on the kebab menu icon on the top right corner of the screen. See here how to configure a module for global search.

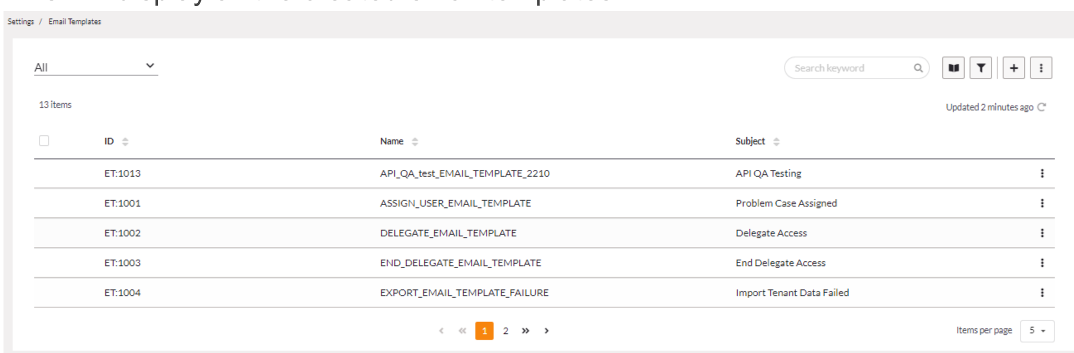
Delete an Email Template

To delete an email template:

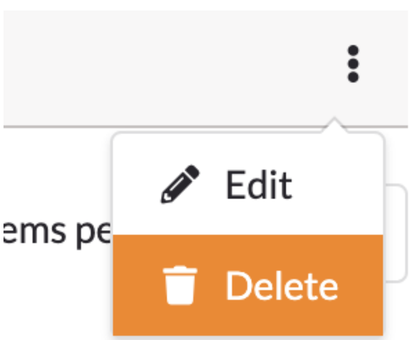
1. Login to the iENT Application.
2. Click on **Settings > Email Templates**.



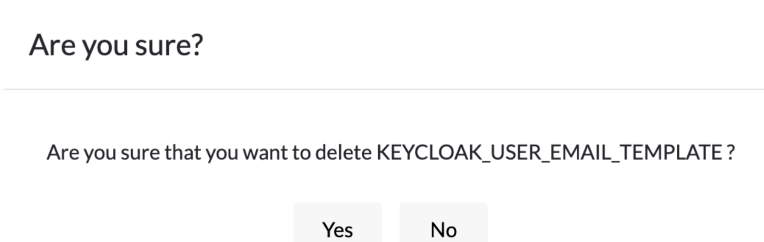
This will display all the created email templates.



3. To delete a template, select the template, click on the kebab menu icon and then click **Delete**.



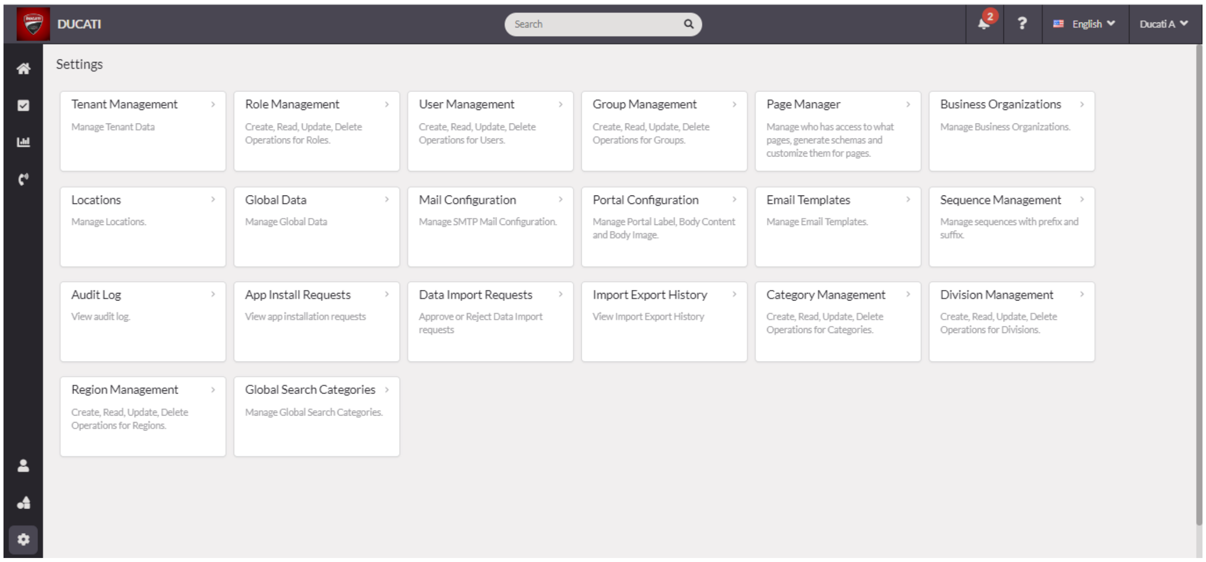
4. Confirm deletion by clicking on **Yes**.

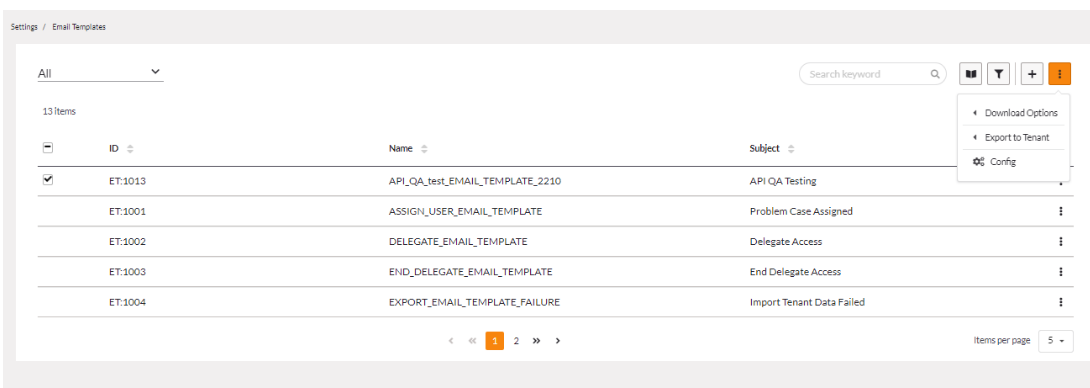


Download Email Templates

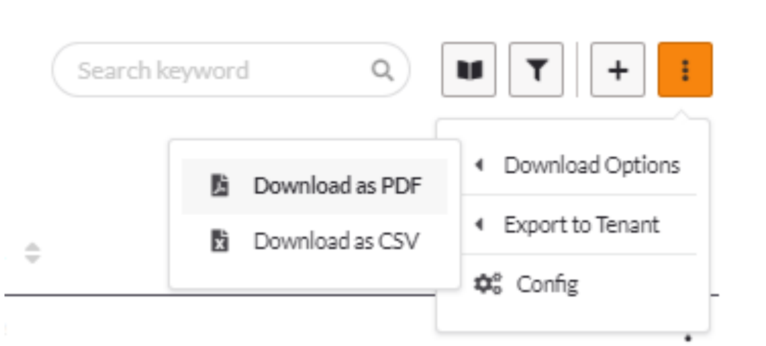
To download a list of email templates:

1. Login to the iENT Application.
2. Click on **Settings > Email Templates**.





3. Select the emails templates, and click on the kebab menu on the top right corner of the screen and select **Download Options.**
4. You can download the list of templates as needed:



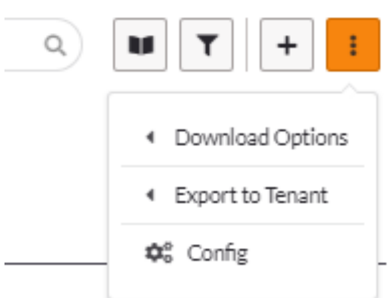
- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

Export Email Templates

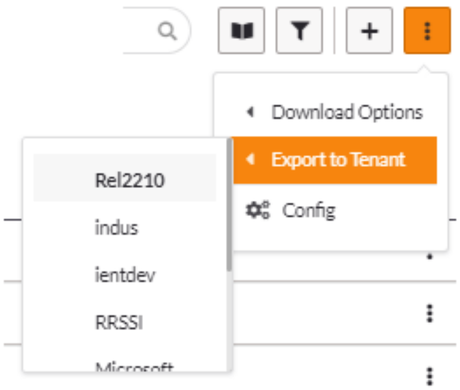
When you create an email template on your iENT account, you can export this template to another tenant account that belongs to your organization.

To export all email templates:

1. Login to the iENT Application.
2. Click on **Settings > Email Templates**.
3. Click on the kebab menu on the top right corner of the screen and select **Export to Tenant.**



4. From the list, you can select the tenant that you want to export all your templates to.



The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Business Organizations

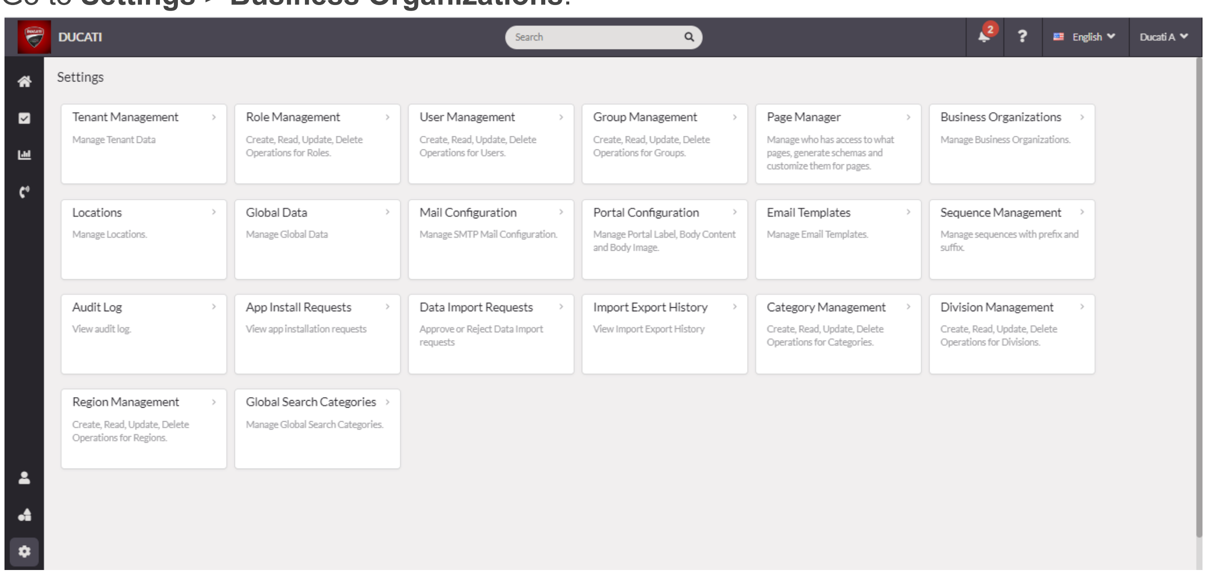
In this section, we will discuss how to manage all your business organization operations. You can perform the following functions:

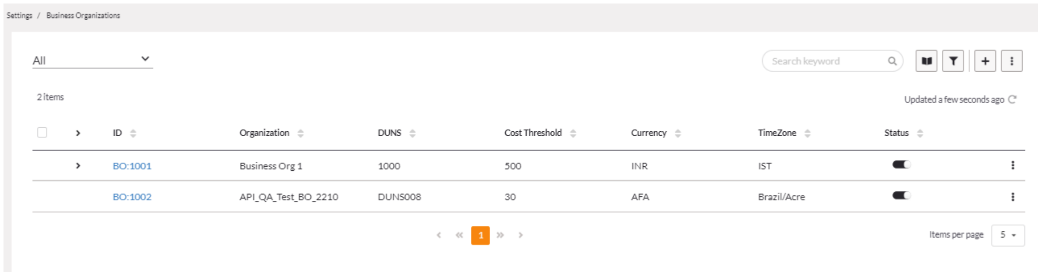
- Add Business Organizations
- View Business Organizations
- Link Locations, Departments, Labor Codes, and Product Lines for an Organization

Add Business Organizations

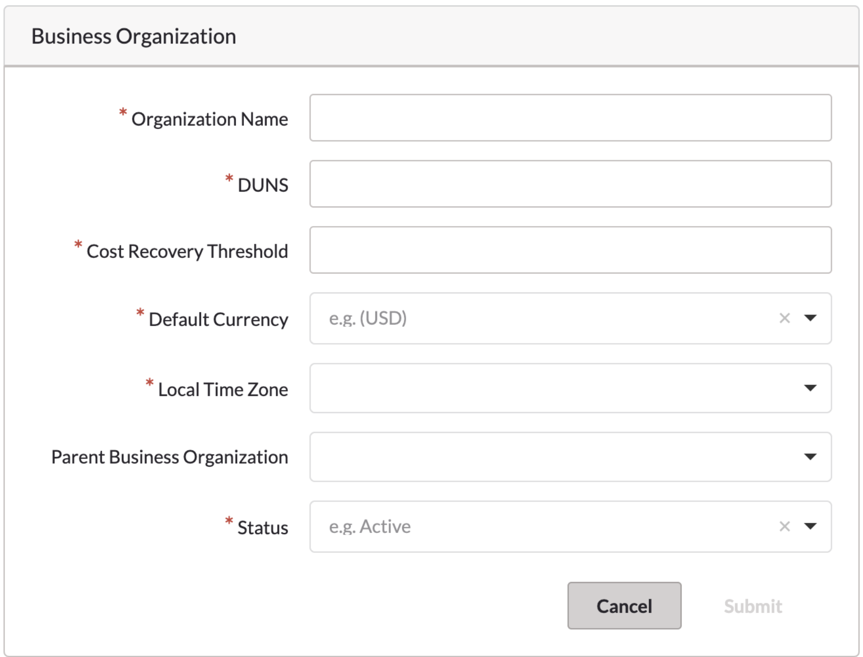
To add a new business organization to the iENT Application:

1. Log in to the iENT Application.
2. Go to **Settings > Business Organizations**.





3. Click on the **+** button on the top right corner.
4. Enter the following details of the new Business Organization:



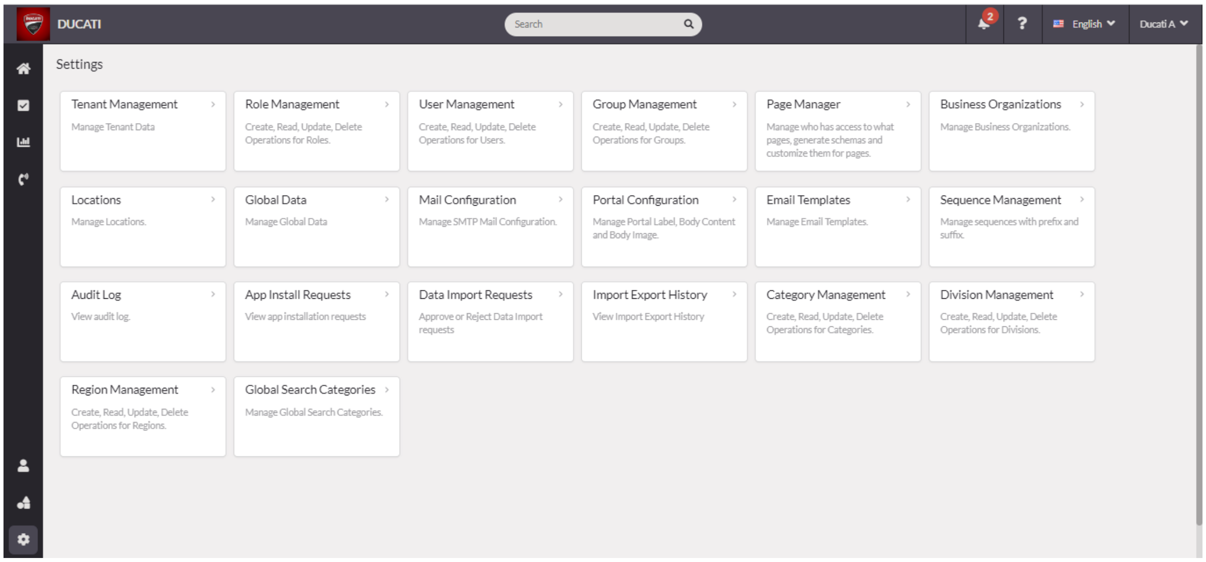
- **Organization Name:** This is the name of the new business organization.
  Note: This is a mandatory field.
- **DUNS:** The Data Universal Numbering System value of your organization.
  Note: This is a mandatory field.
- **Cost Recovery Threshold:** This is the threshold for recovering the costs of any given expense.
  Note: This is a mandatory field.
- **Default Currency:** Select your default currency from the dropdown.
  Note: This is a mandatory field.
- **Local Time Zone:** Select your local time zone from the dropdown.
  Note: This is a mandatory field.
- **Parent Business Organization:** If applicable, select an existing parent organization from the dropdown. This will create a **Sub Organization (Leaf)** to the parent organization.
- **Status:** Select the new organization's status (*active* / *inactive*) from the dropdown.
  Note: This is a mandatory field.

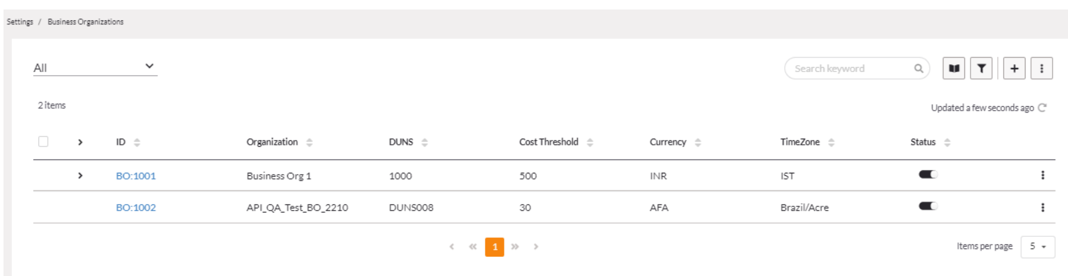
5. Click on **Submit.**

View Business Organizations

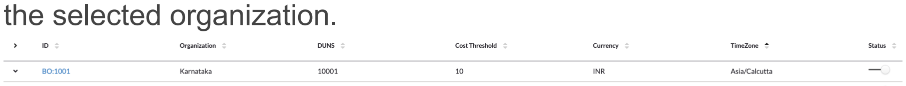
To view all your business organizations:

1. Login to the iENT Application.
2. Click on **Settings > Business Organization**.





3. The following details of all Business Organizations are displayed:
    - **ID**
    - **Organization**
    - **DUNS**
    - **Cost Threshold**
    - **Currency**
    - **Time Zone**
    - **Status**
4. See *here* to explore how you can search, view, sort, and filter all the displayed records.
5. Click on the arrow **>**button near the organization ID to see sub **organizations (leafs)** of the selected organization.



6. Click on any organization to view details of the selected organization as well as the associated **departments**, **labor codes** and **product lines**.

Link Locations, Departments, Labor Codes, and Product Lines for an Organization

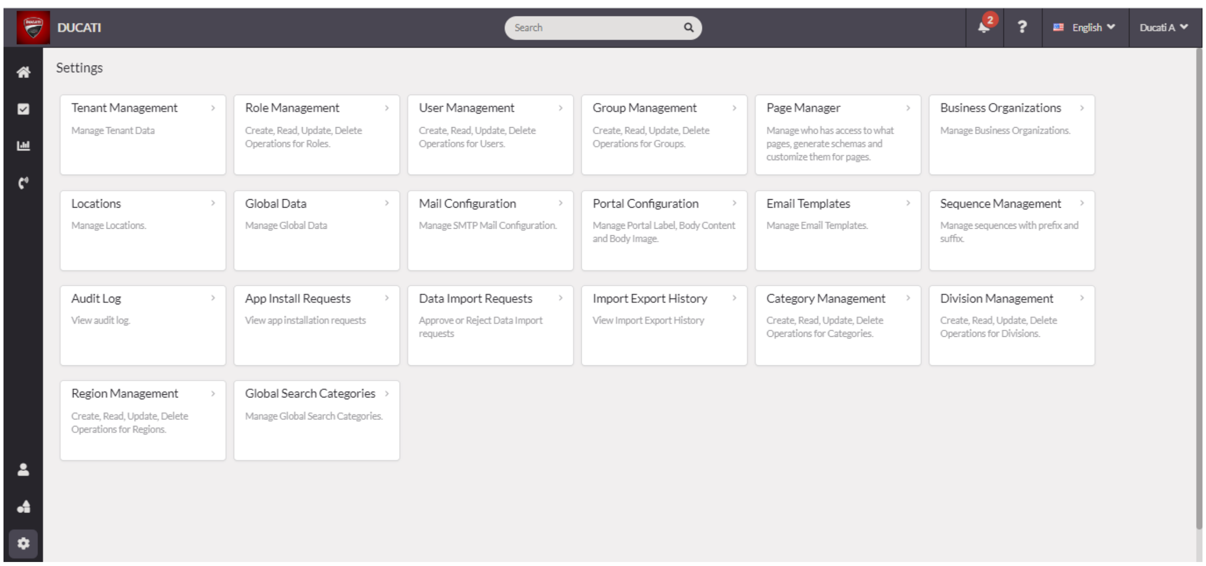
In this section, we will cover how to view locations linked to a selected business organization, and create departments, labor codes and product lines for the selected business organization. Linking locations to an organization is possible only for leaf business organizations.
Note: If you assign locations to a business organization, you will not be able to create sub organizations for the said business organization.

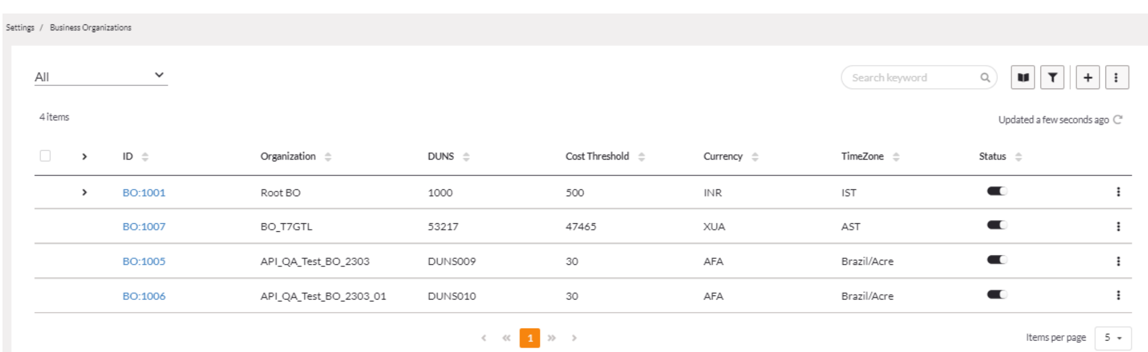
Locations

A location is an organizational unit serving to subdivide an enterprise according to production, procurement, maintenance, and materials planning aspects. It is a place where either materials are produced or goods and services provided.

To view Locations linked to a business sub organization or link any new location:

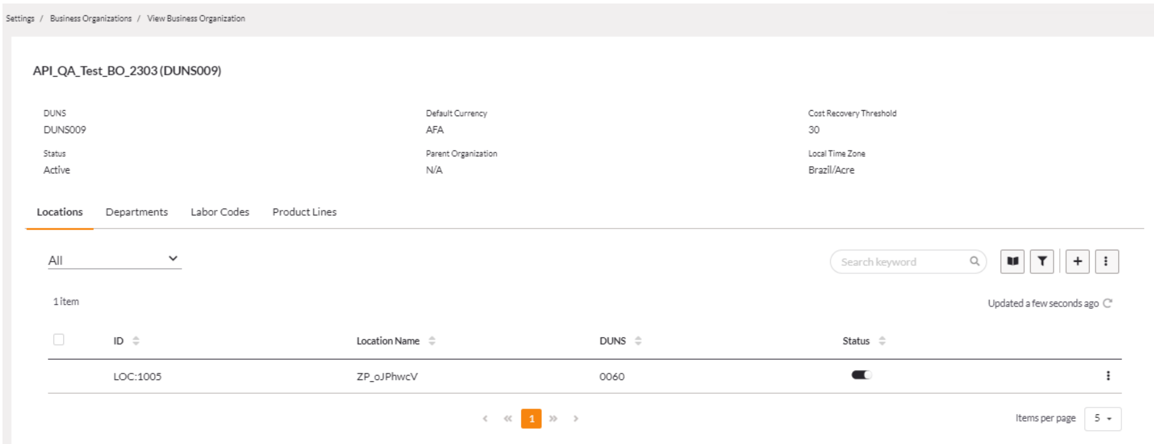
1. Login to the iENT Application.
2. Click on **Settings > Business Organization**.



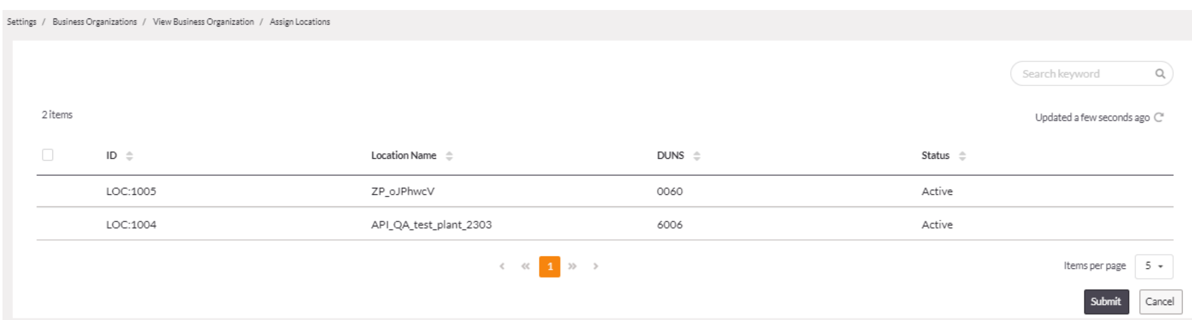


3. Click on the arrow **>**button near the organization ID to see sub organization.

4. Click the business sub organization ID for which you want to view the linked locations. The **Locations** tab is opened by default.

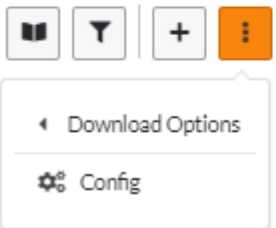


5. The following details are displayed for the already linked locations:
    - **ID**
    - **Location Name**
    - **DUNS**
    - **Status**
6. See *here* to explore how you can search, view, sort, and filter all the displayed records.
7. Click on the **+** button to add a new location to the sub organization.



Note: This screen displays the list of available locations that can be linked to the child organization. This screen only displays available locations if during the addition of the location details; it is not linked to a child organization.
Note: To link a location you have to add the location data in Locations module and link it to the child organization. See here how to create and link a location to a child organization.

8. Select the location that you want to link and click **Submit**.
9. To delink a location from the child organization, click on the kebab menu (**Actions** menu) for the selected location and select **Delete**.
10. To download a list of locations, select the locations and click on the kebab menu and select **Download Options.** You can download the list of locations as needed:



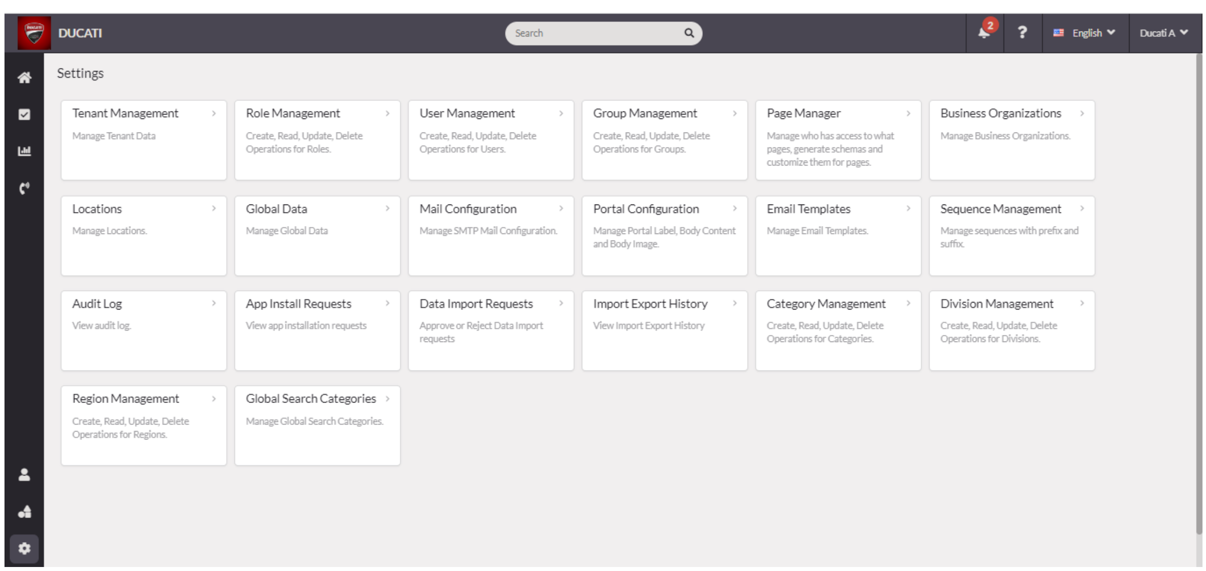
- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

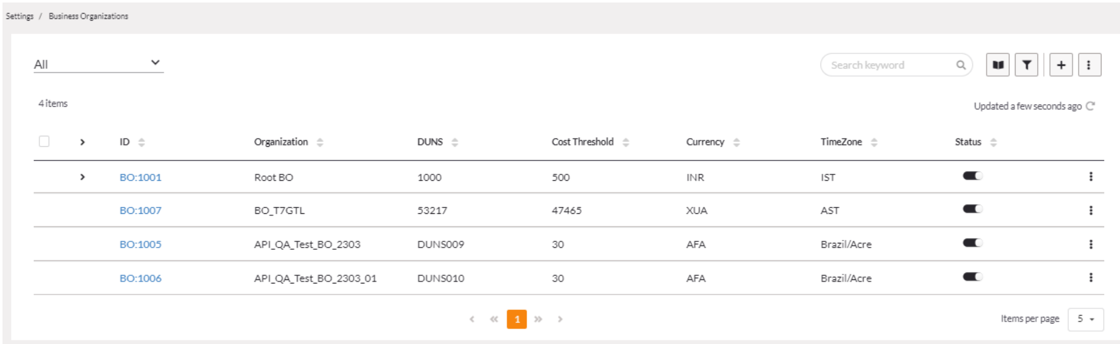
Departments

A department is an organizational subdivision based on the function of each unit in the enterprise. This can include departments such as administration, production, procurement, quality assurance, accounts, finance, etc.

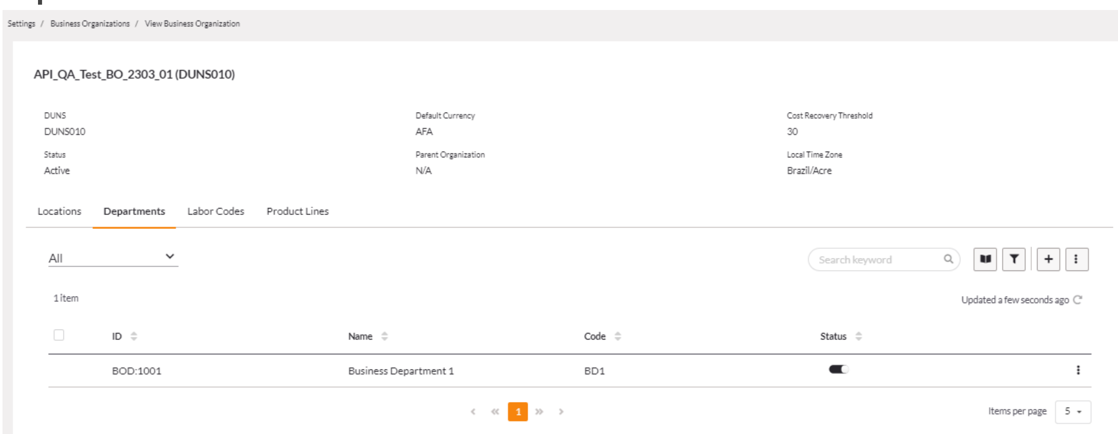
To link Departments to the organization:

1. Login to the iENT Application.
2. Click on **Settings > Business Organization**.

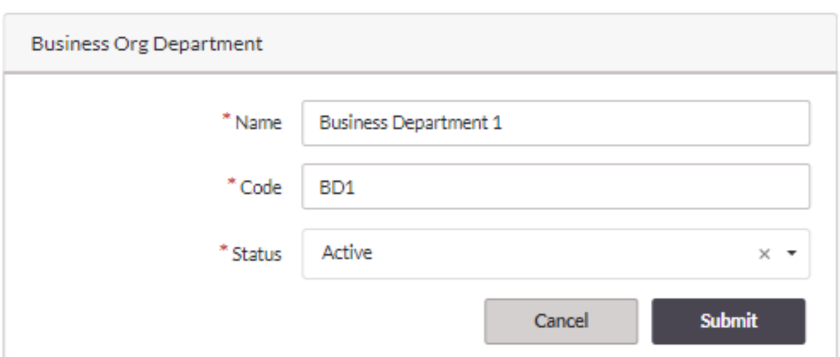




3. Select the business organization that you want to link the department to, and select the **Departments** tab.



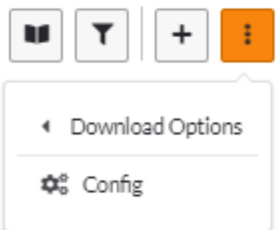
4. The following details are displayed for existing department, if any:
   - **ID**
   - **Name**
   - **Code**
   - **Status**
5. See *here* to explore how you can search, view, sort, and filter all the displayed records.
6. Click on the **+** button to add a new department to the organization. Add the following mandatory details and click on **Submit**:



   - **Name**
   - **Code**
   - **Status**

Note: To add department to a child organization, select the child organization and add the department.

7. To download a list of departments, click on the kebab menu select **Download Options.** You can download the list of departments as needed:



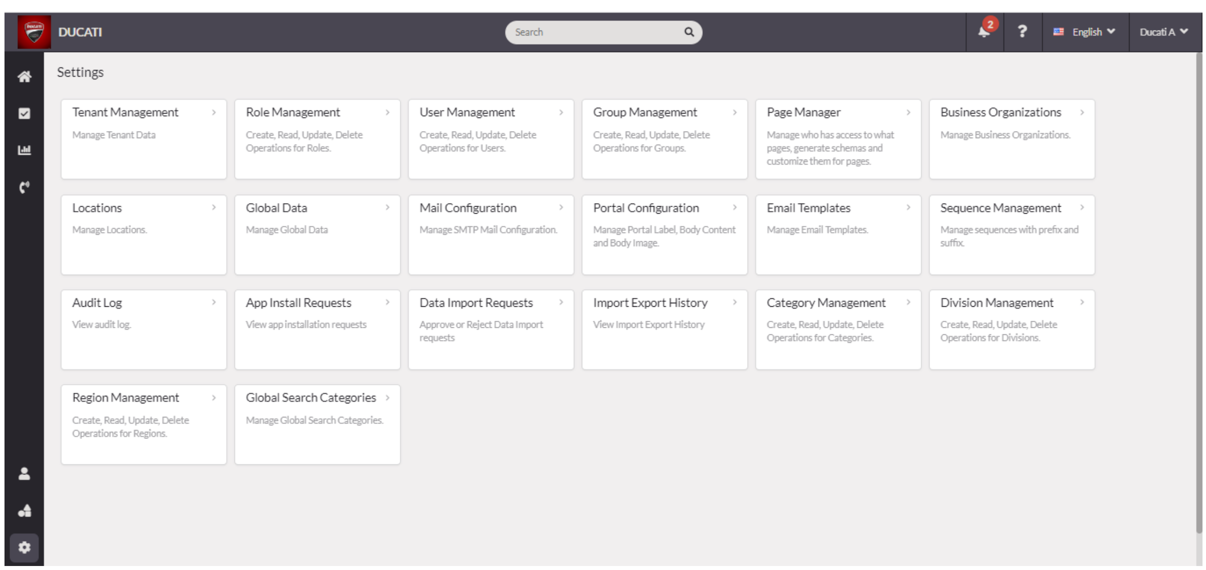
- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

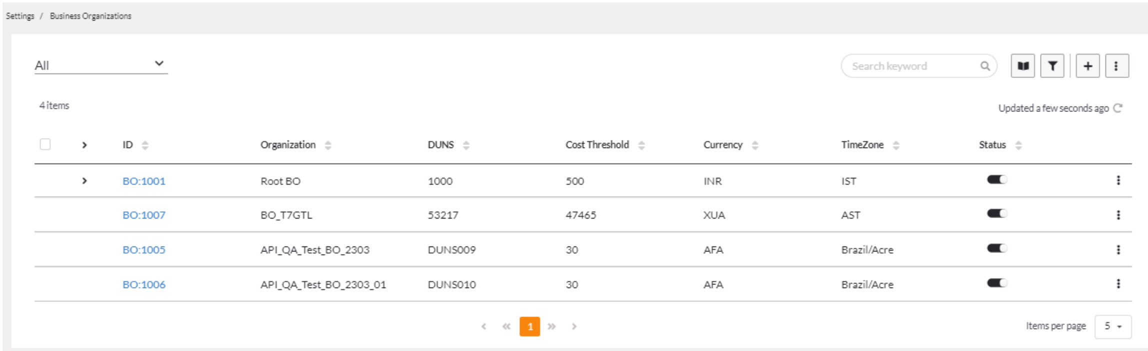
Labor Codes

On the iENT platform, you can define labor codes that may be applicable to a business organization based on regional definitions.

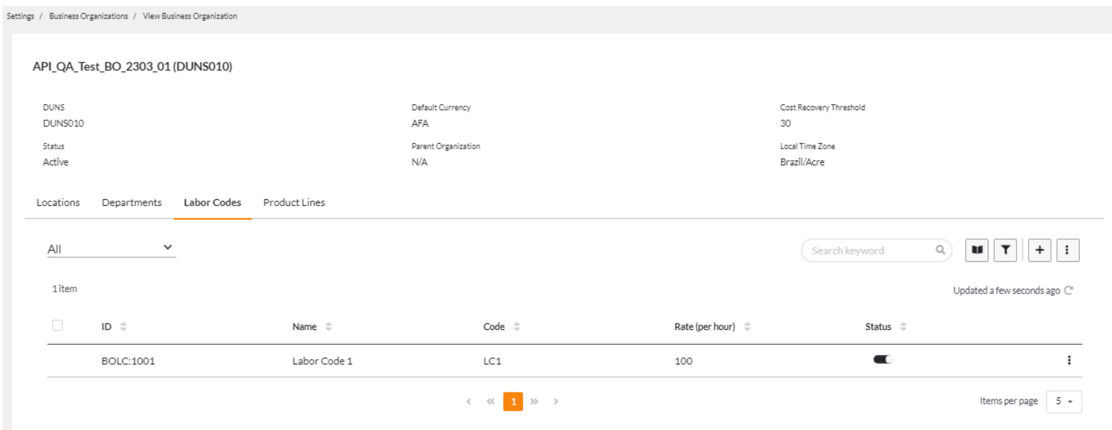
To link labor codes to a business organization:

1. Login to the iENT Application.
2. Click on **Settings > Business Organization**.

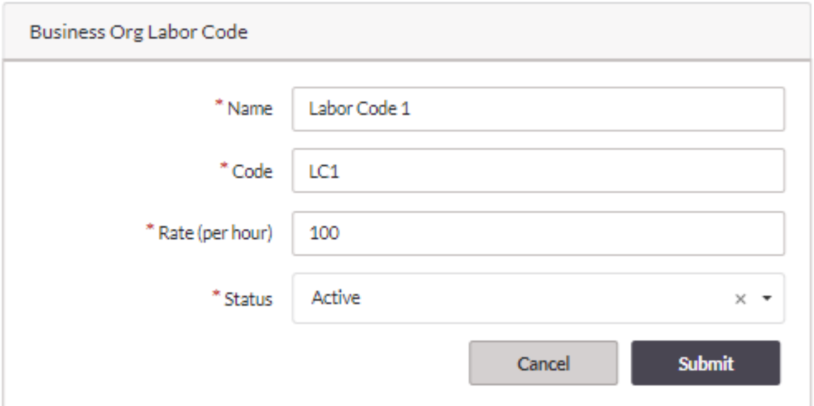




3. Select the business organization that you want to link the labor codes to, and select the **Labor Codes** tab.



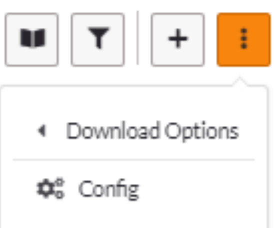
4. The following details are displayed:
   - **ID**
   - **Name**
   - **Code**
   - **Rate (per hour)**
   - **Status**
5. See *here* to explore how you can search, view, sort, and filter all the displayed records.
6. Click on the **+** button to add a new labor code to the organization. Add the following mandatory details and click on **Submit**:



- **Name**
- **Code**
- **Rate (per hour)**
- **Status**

  Note: To add labor code to a child organization, select the child organization and add the labor code.

7. To download a list of labor codes, click on the kebab menu and select **Download Options.** You can download the list of labor codes as needed:



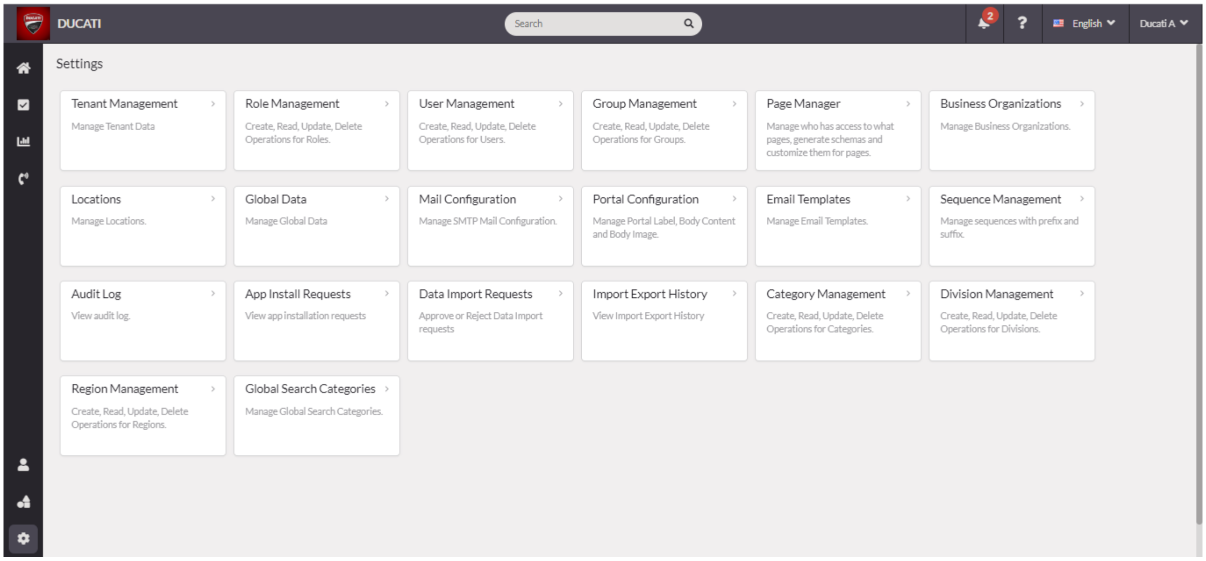
   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

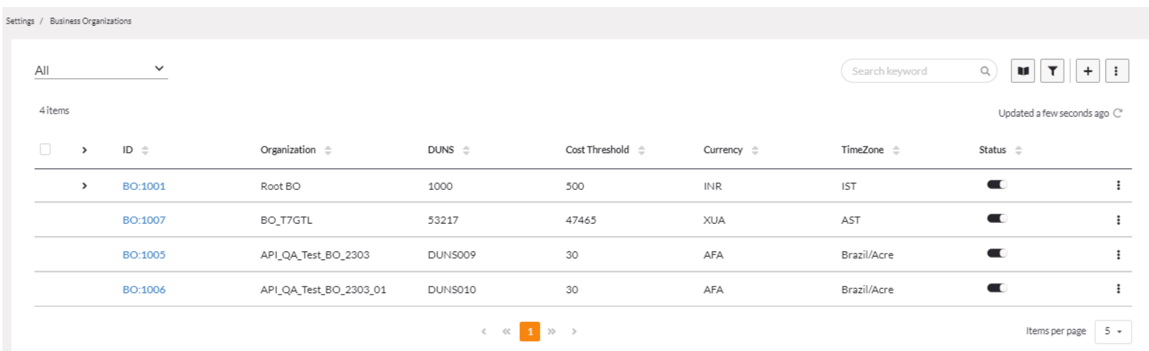
Product Lines

Business production can consist of a mixture of goods and service lines. In purchase orders with multiple levels (item groups and grouped items), product lines can be either individual lines, item groups, or grouped items.

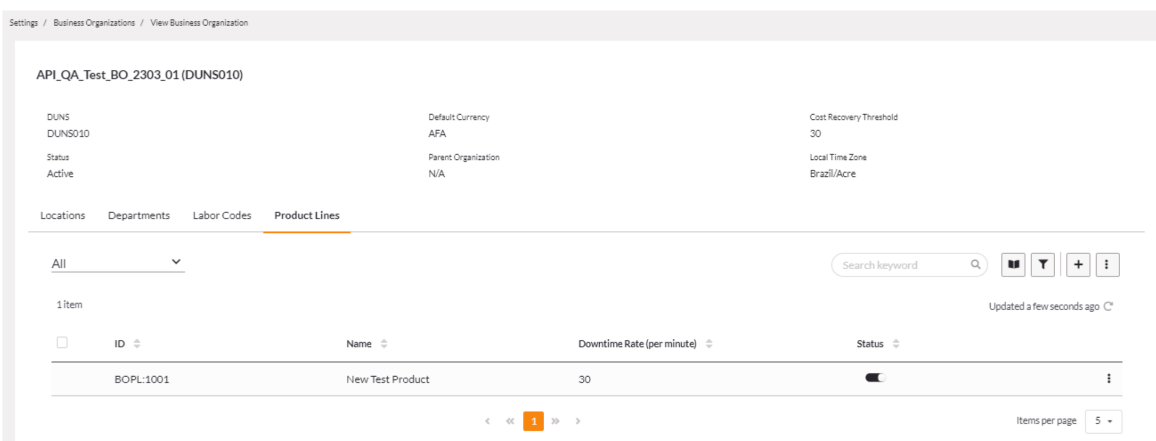
To link product lines to a business organization:

1. Login to the iENT Application.
2. Click on **Settings > Business Organization**.



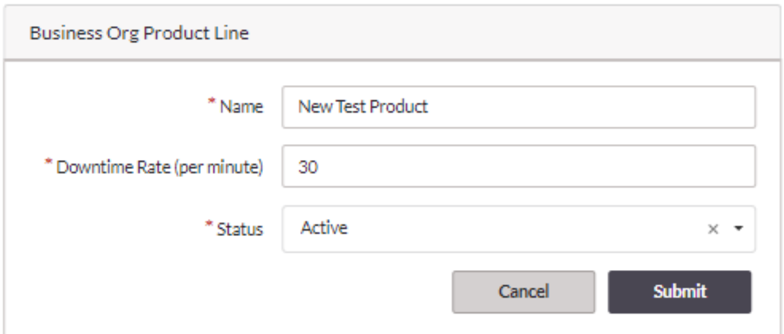


3. Select the business organization that you want to link the product line to, and select the **Product Lines** tab.



4. The following details are displayed for existing product lines, if any:
   - **ID**
   - **Name**
   - **Downtime Rate (per minute)**
   - **Status**
5. See *here* to explore how you can search, view, sort, and filter all the displayed records.

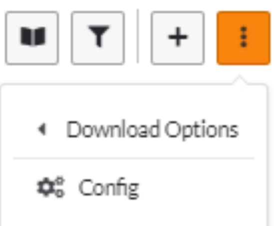
6. Click on the **+** button to add a new product line to the organization. Add the following mandatory details and click on **Submit**:



   - **Name**
   - **Downtime Rate (per minute)**
   - **Status**

   Note: To add product line to a child organization, select the child organization and add the product line.

7. To download a list of product lines, click on the kebab and select **Download Options.** You can download the list of product lines as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

Locations

In this section, we will discuss how to manage all your locations' operations. You can perform the following functions:

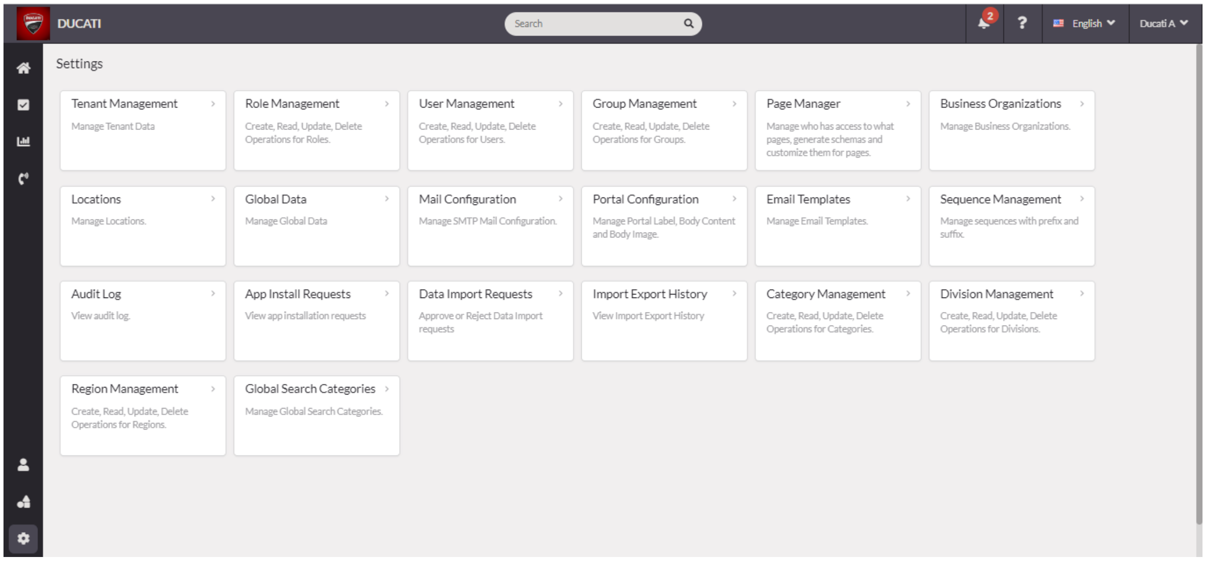
- Add Locations
- View Locations
- Link Departments, Location Lines, and Labor Codes

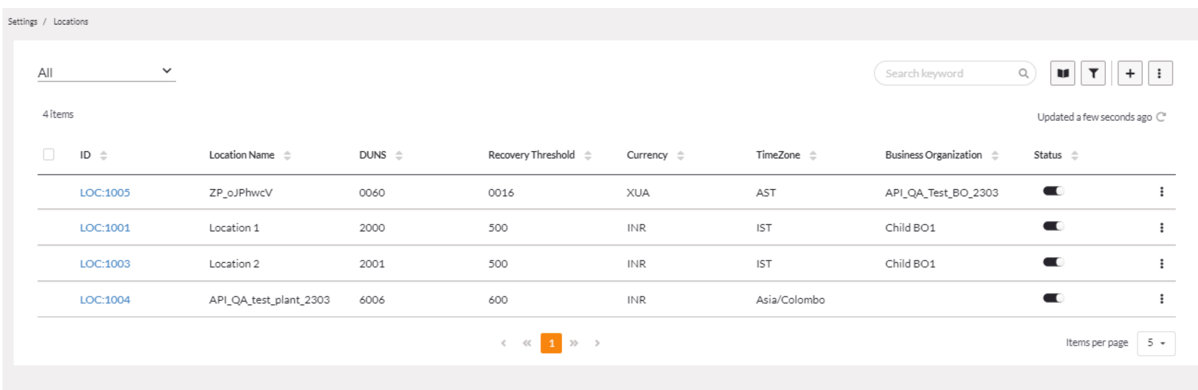
Add Locations

To add a new location:

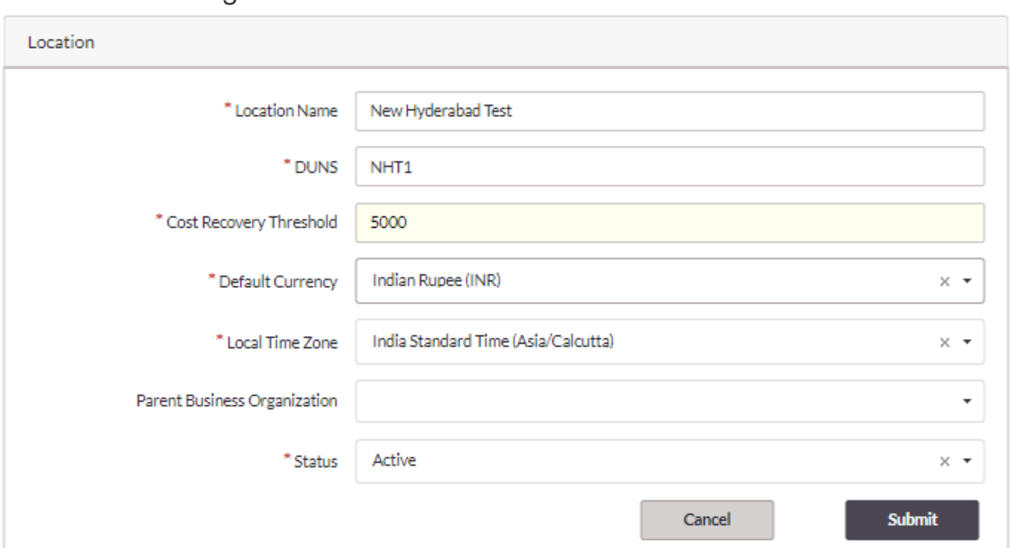
1. Log in to the iENT Application.

2. Go to **Settings > Locations**.





3. Click on the **+** button on the top right corner.
4. Enter the following details of the new location:



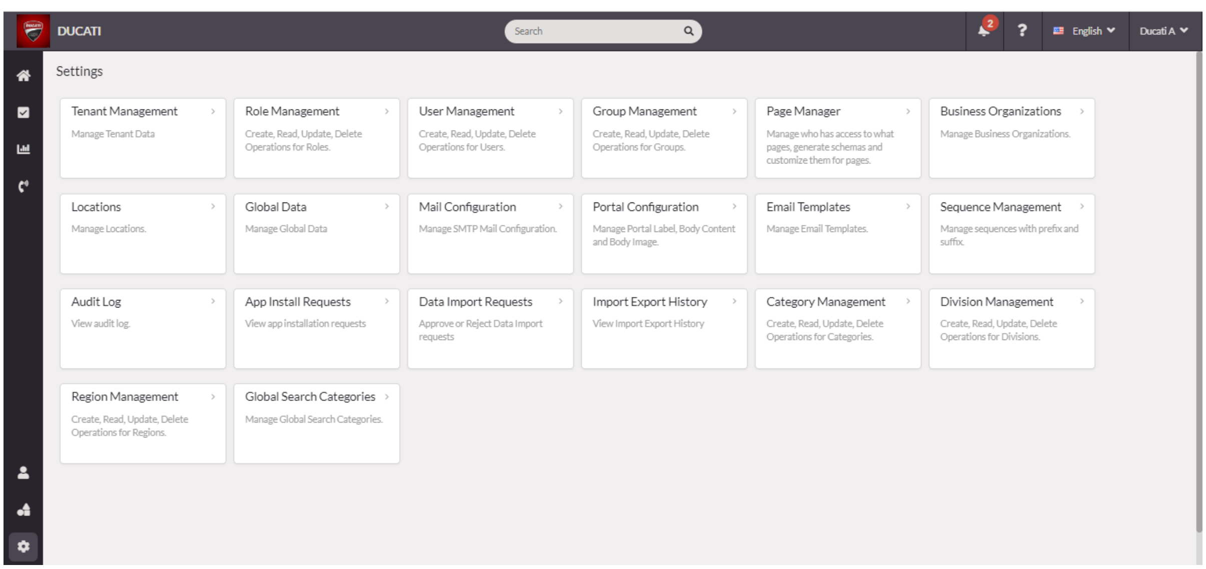
a. **Location Name:** This is the name of the new location.
Note: This is a mandatory field and it should be unique in the system.
b. **DUNS:** The Data Universal Numbering System value of your organization.
Note: This is a mandatory field.
c. **Cost Recovery Threshold:** This is the threshold for recovering the costs of any given expense.
Note: This is a mandatory field.
d. **Default Currency:** Select your default currency from the dropdown.
Note: This is a mandatory field.
e. **Local Time Zone:** Select your local time zone from the dropdown.
Note: This is a mandatory field.
f. **Parent Business Organization:** If applicable, select an existing organization from the dropdown. Selecting an organization will link this location to the organization.
g. **Status:** Select the new location's status (*active* / *inactive*) from the dropdown.
Note: This is a mandatory field.

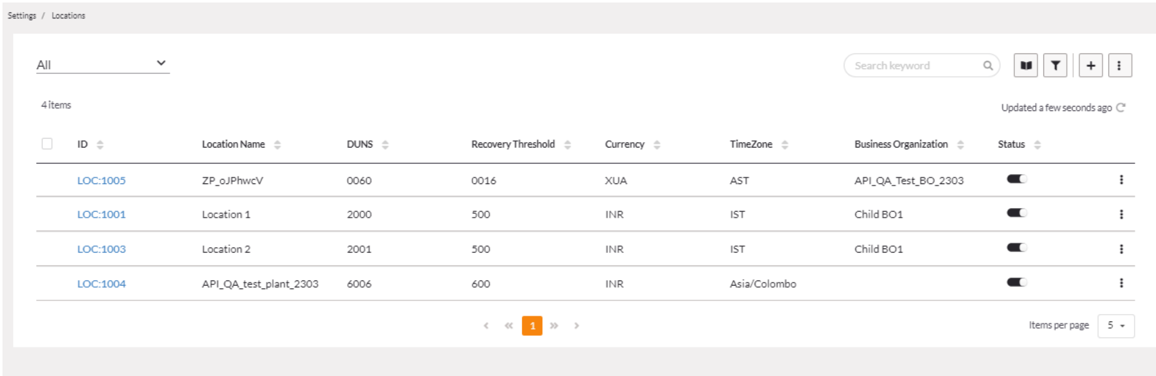
5. Click on **Submit.**

View Locations

To view all locations you entered in the Location module:

1. Login to the iENT Application.
2. Click on **Settings > Locations**.





3. The following details of all locations already added to the Location module are displayed:
    - **ID**
    - **Location Name**
    - **DUNS**
    - **Recovery Threshold**
    - **Currency**
    - **Time Zone**
    - **Status**
4. See *here* to explore how you can search, view, sort, and filter all the displayed records.
5. Click on any location to view details of the organization as well as the associated **departments**, **labor codes** and **location lines**.

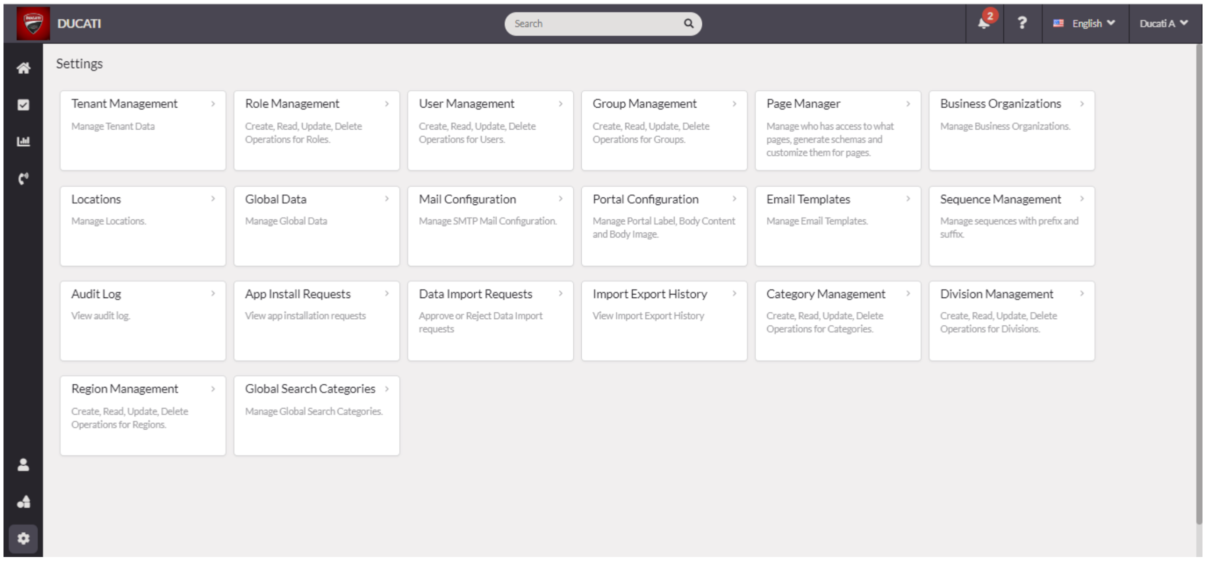
Link Departments, Location Lines, and Labor Codes to a Location

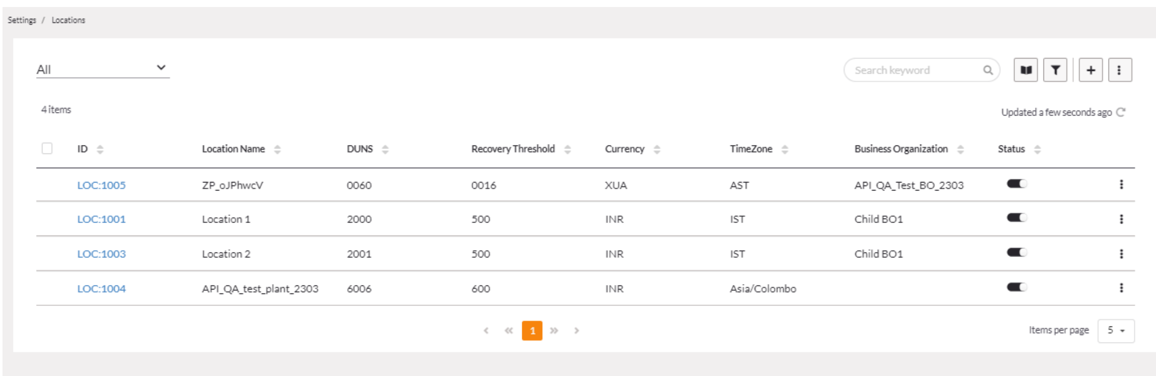
In this section we will cover how to link departments, location lines and labor codes to a location.

Departments

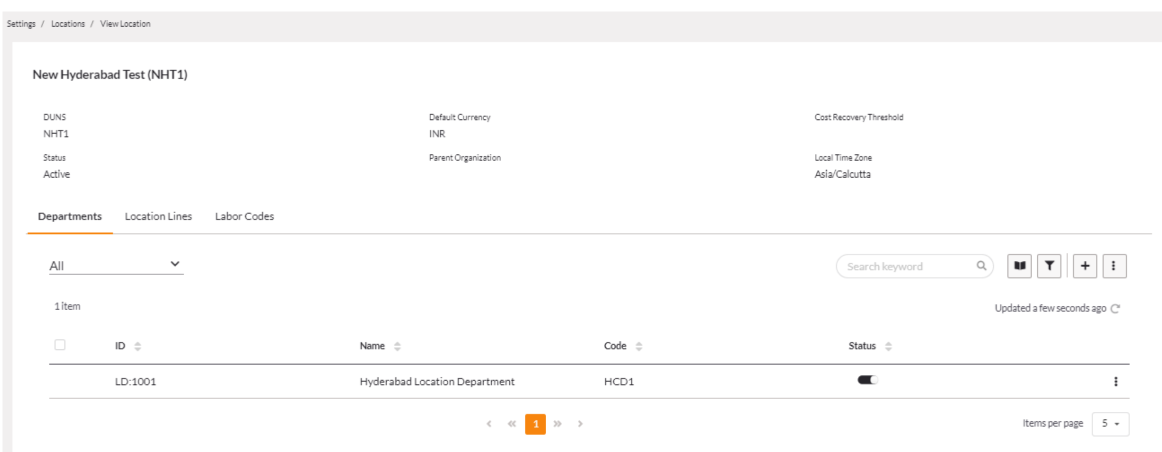
To link departments to a selected location:

1. Login to the iENT Application.
2. Click on **Settings > Locations**.





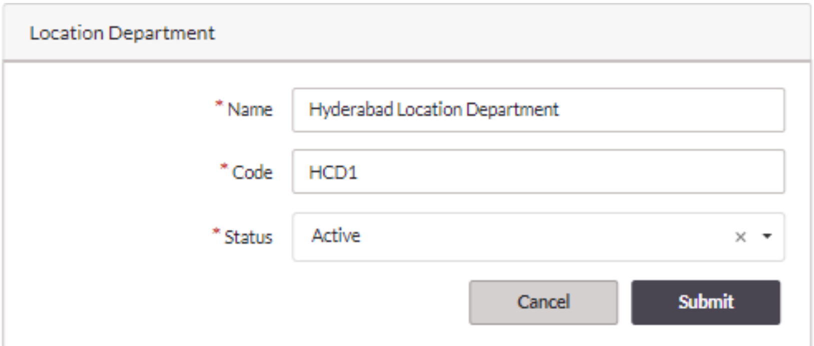
3. Select the location that you want to link the department to.
   The Departments tab is displayed by default.



4. The following details are displayed:
   - **ID**
   - **Name**

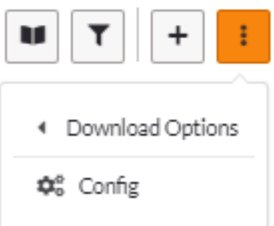
- Code
- Status

5. See *here* to explore how you can search, view, sort, and filter all the displayed records.
6. Click on the **+** button to add a new department to the location. Add the following mandatory details and click on **Submit**:



- **Name**
- **Code**
- **Status**

7. To download a list of departments, select the departments and click on the kebab menu and select **Download Options.** You can download the list of departments as needed:

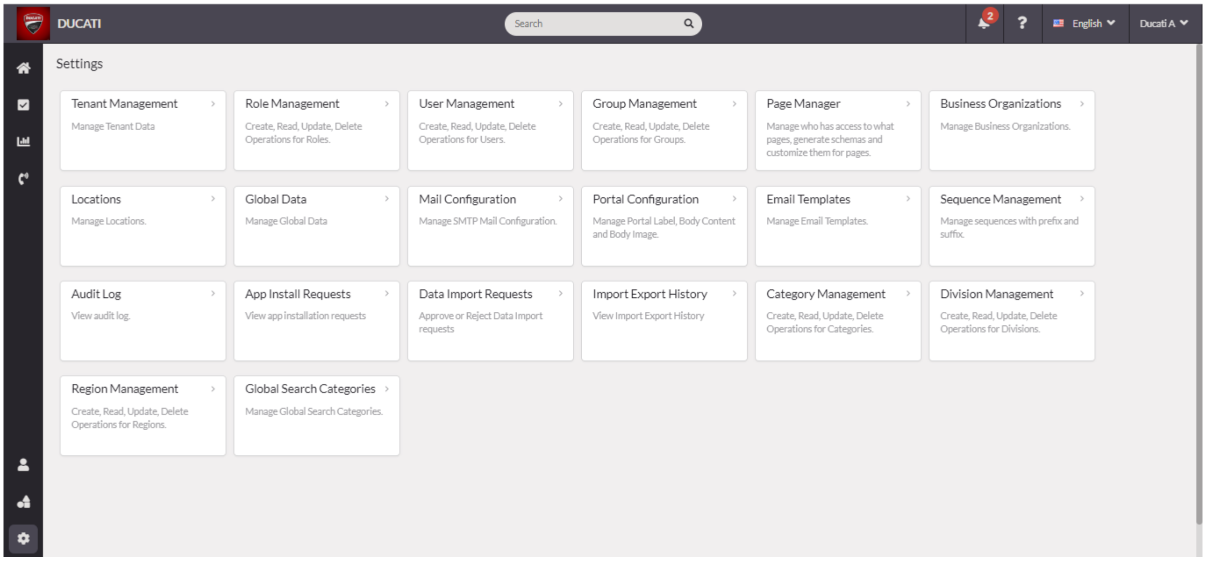


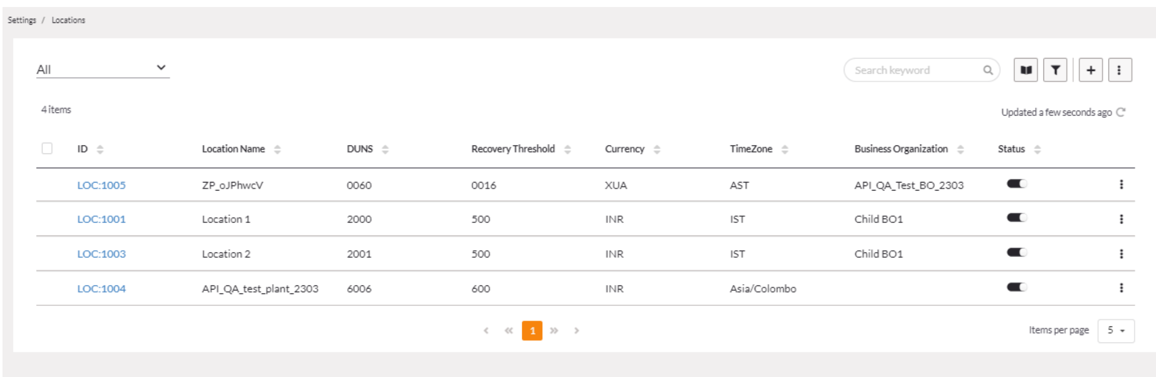
- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

Location Lines

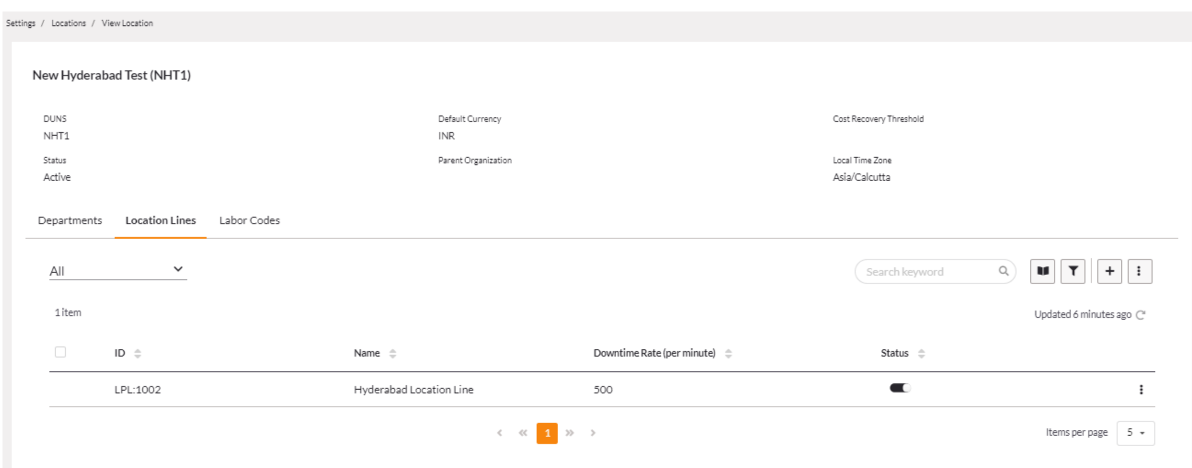
To link a location line to a selected location:

1. Login to the iENT Application.
2. Click on **Settings > Locations**.





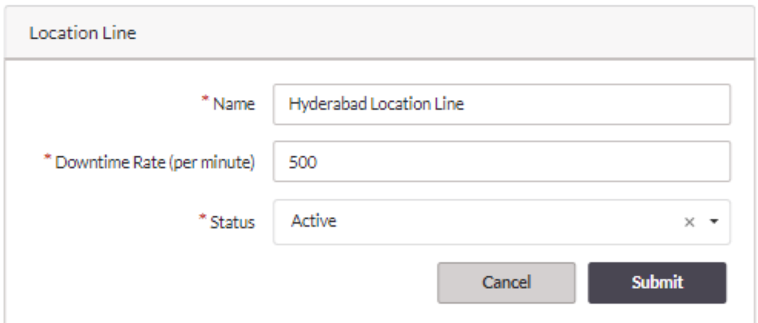
3. Select the location that you want to link the department to, and select the **Location Lines** tab.



4. The following details are displayed:
   - **ID**
   - **Name**

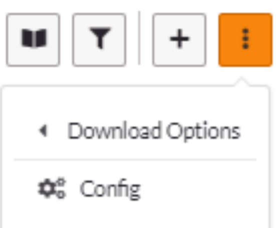
- **Downtime Rate (per minute)**
- **Status**

5. See *here* to explore how you can search, view, sort, and filter all the displayed records.
6. Click on the **+** button to add a new location line to the location. Add the following mandatory details and click on **Submit**:



   - **Name**
   - **Downtime Rate (per minute)**
   - **Status**

   To download a list of location lines, select the location lines and click on the kebab menu and select **Download Options.** You can download the list of location lines as needed:

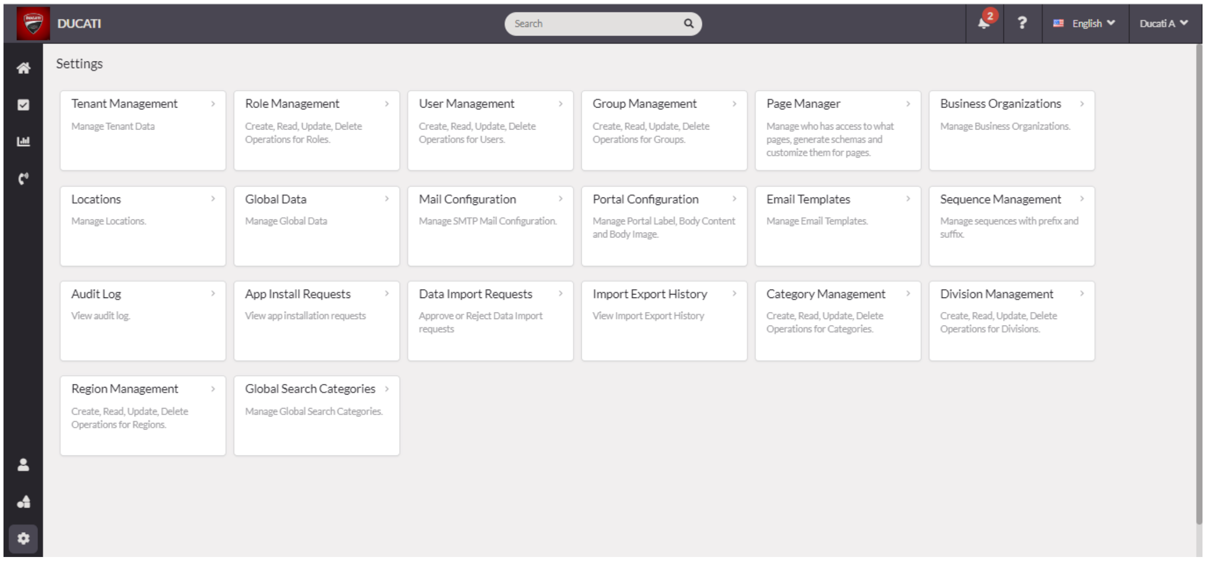


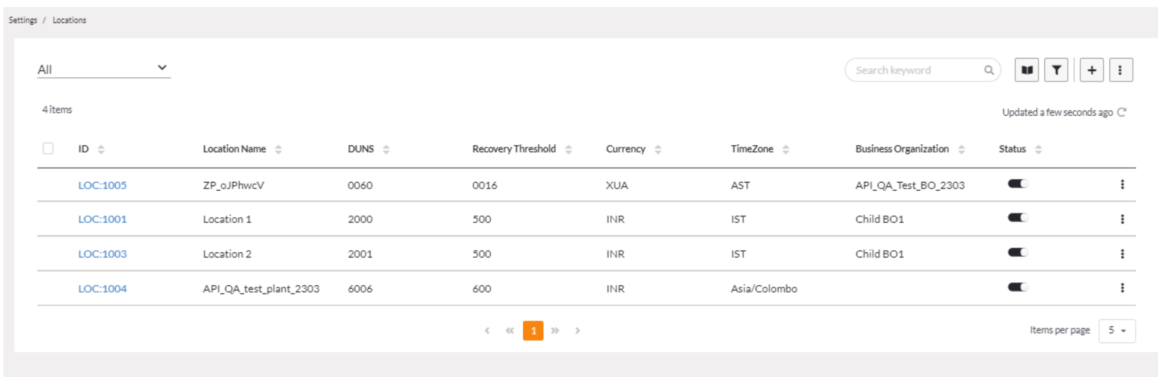
   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

Labor Codes

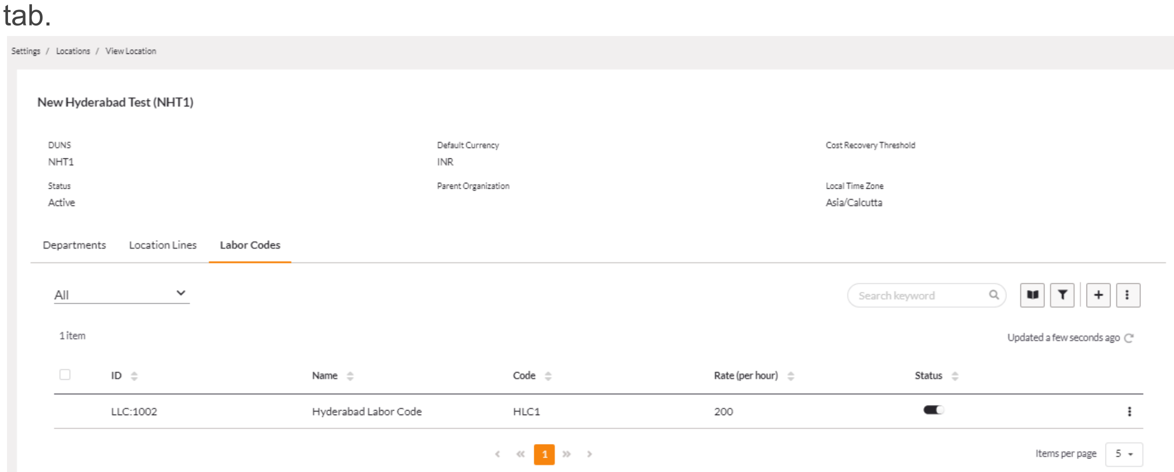
To link labor codes to a selected location:

1. Login to the iENT Application.
2. Click on **Settings > Locations**.





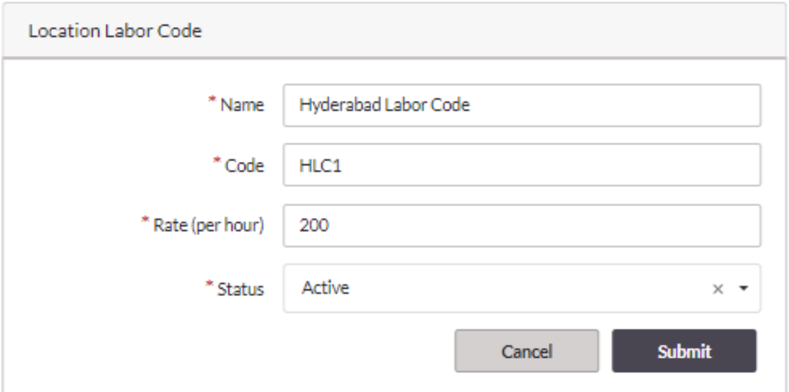
3. Select the location that you want to link the labor code to, and select the **Labor Codes** tab.



4. The following details are displayed:
    - **ID**
    - **Name**
    - **Code**
    - **Rate (per hour)**

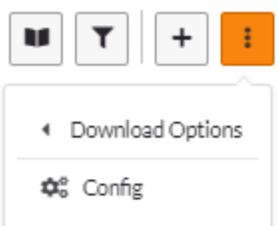
- **Status**

5. See *here* to explore how you can search, view, sort, and filter all the displayed records.
6. Click on the **+** button to add a new labor code to the location. Add the following mandatory details and click on **Submit**:



- **Name**
- **Code**
- **Rate (per hour)**
- **Status**

7. To download a list of labor codes, select the labor codes and click on the kebab menu and select **Download Options.** You can download the list of labor codes as needed:



- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

Role Management

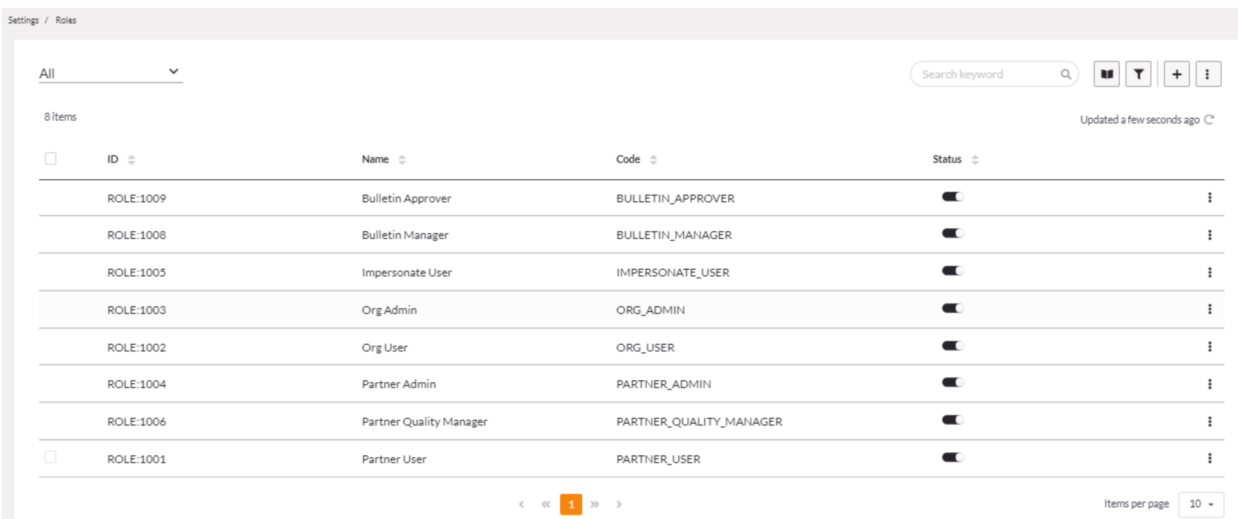
A role defines the functions of a user within the iENT Application. Each role has a unique name and set of associated permissions that specify what users who are assigned to the role can see and do on the iENT platform. A role can be assigned to any number of users.

Your role in the system is defined as the Org Admin (Buyer Administrator) by the Super Admin. As the Org Admin, you can define new roles with a specific set of user permissions that determine what the assigned users can see or do in the system.

When a new tenant is created, a few default roles are created which cannot be deleted. These include: *Org Admin*, *Partner User, Org User, Partner Admin, Impersonate User, Bulletin Manager, Partner Quality Manager, and Bulletin Approver.*
The following five roles have been renamed in iENT release version 23.03.

From	To
Buyer Admin	Org Admin
Supplier User	Partner User
Buyer User	Org User
Supplier Admin	Partner Admin
Supplier Quality Manager	Partner Quality Manager

Note: This document may contain references to old roles.
As a Org Admin, you can modify the names of the roles using the **Edit** functionalitiy. However, the codes associated with these roles cannot be modified.



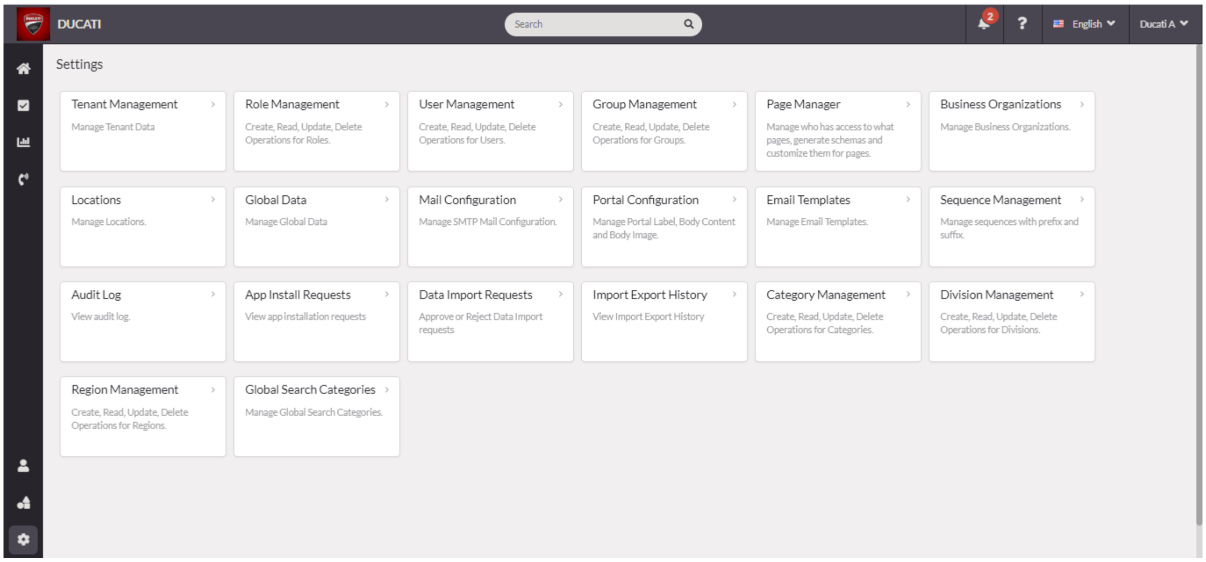
You can perform the following operations:

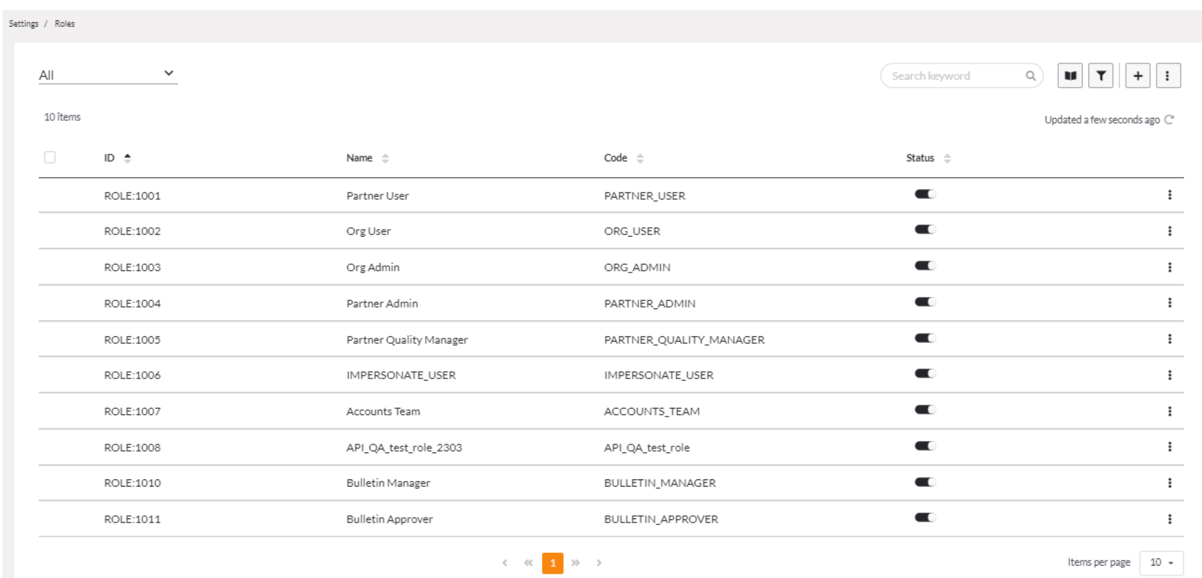
- Add New Roles
- View Roles
- Edit Roles
- Delete Roles
- Download and Export Roles

Add New Roles

To create a new role:

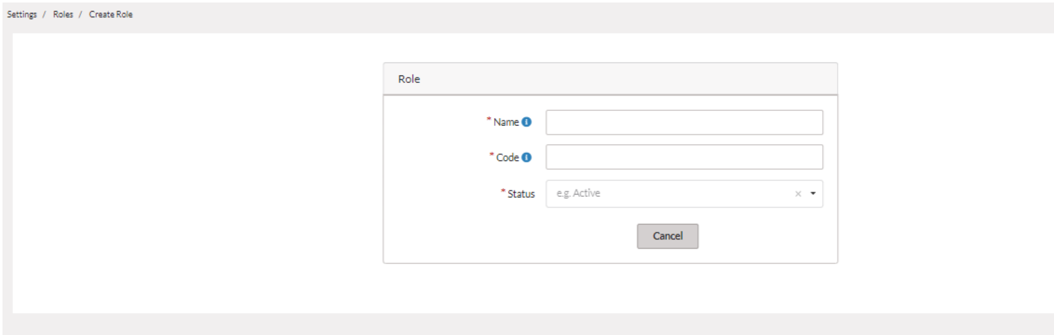
1. Login to the iENT Application.
2. Click on **Settings > Role Management**.





3. Click on the **+** button on the top right corner.

4. Enter the following details of the new Role:



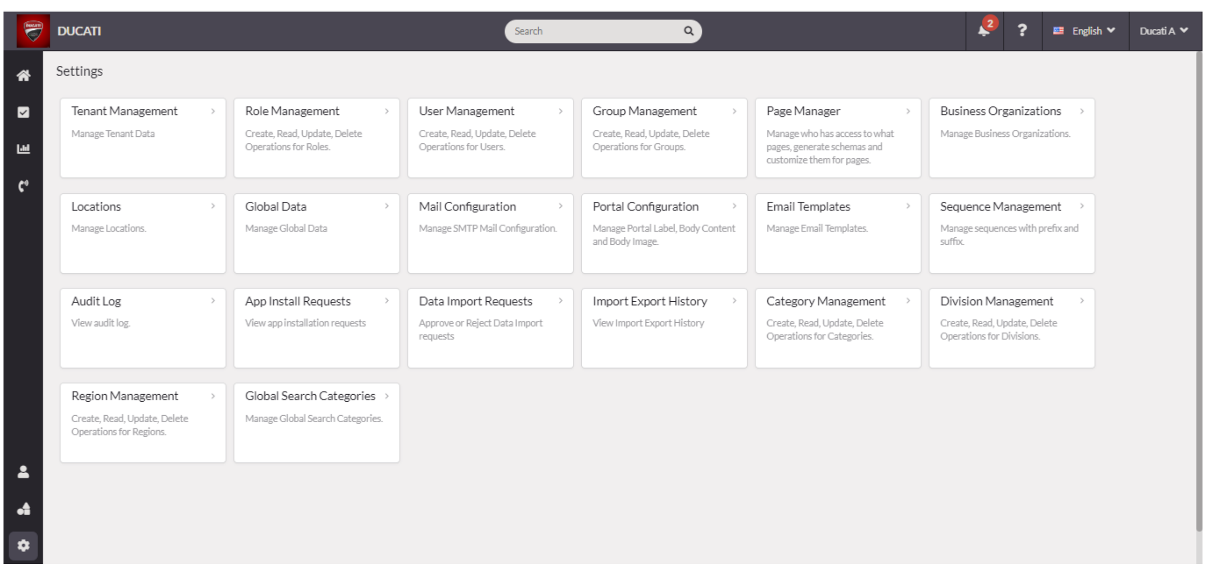
   - **Name:** Assign a name to the new role. Ensure that it is unique in the system.
     Note: This is a mandatory field.
   - **Code:** Enter a code value for the new role.
     Note: This is a mandatory field.
   - **Status:** Select the new role's status (*active* / *inactive*) from the dropdown.
     Note: This is a mandatory field.

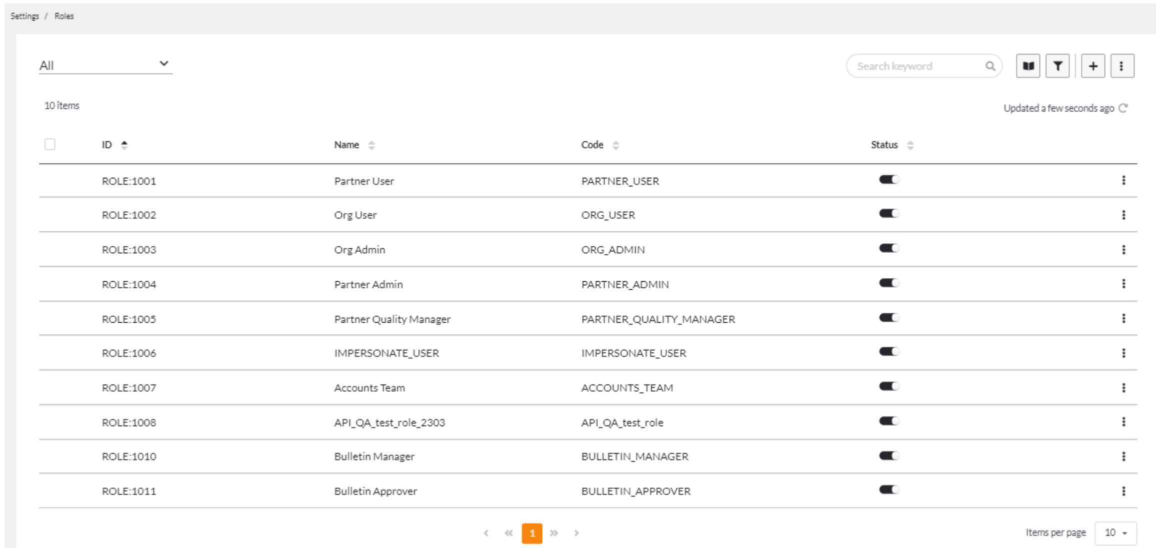
5. Click on **Submit.**

View Roles

To view the existing roles:

1. Login to the iENT Application.
2. Click on **Settings > Role Management**.





3. The following details of all Roles are displayed:
    - **ID**
    - **Name**
    - **Code**
    - **Status**
      You can Toggle the status button of any role, to activate or deactivate the said role. The default roles created in the system cannot be deactivated.

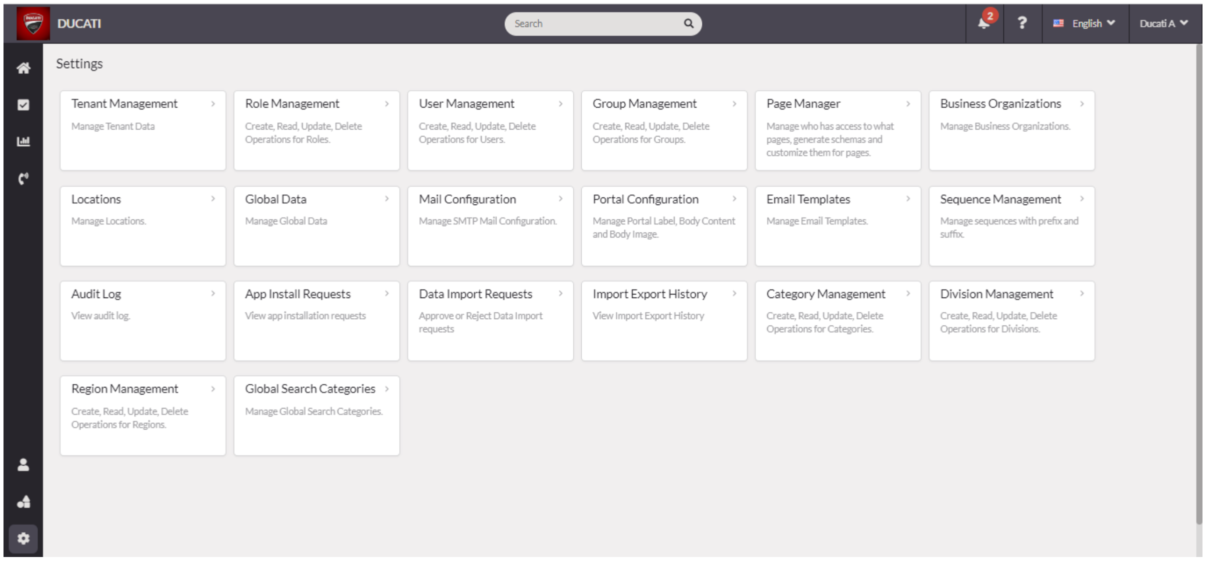
   See *here* to explore how you can search, view, sort, and filter all the displayed records.

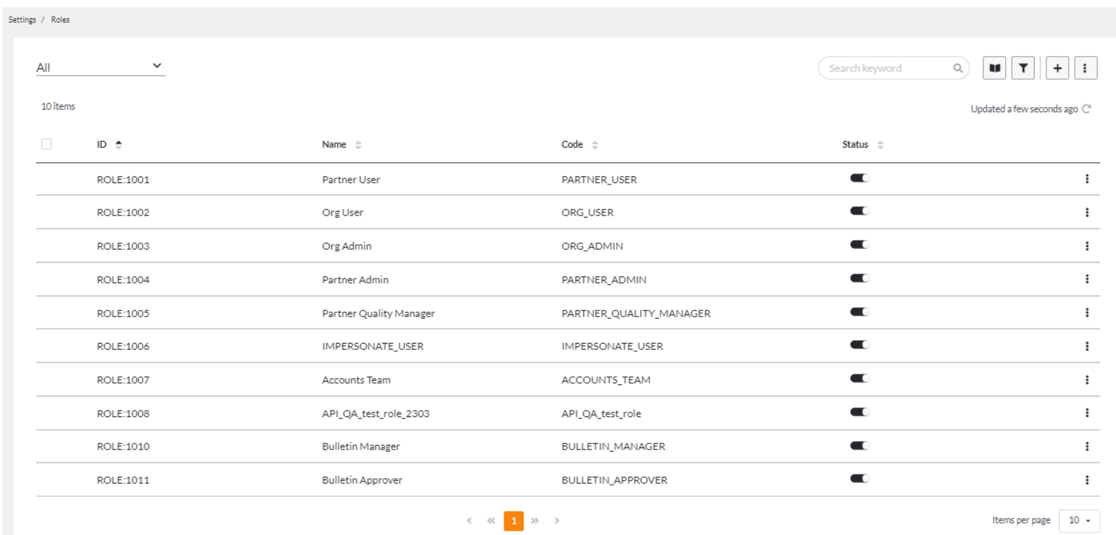
Edit Roles

You can only edit the names of the roles and not the associated code.

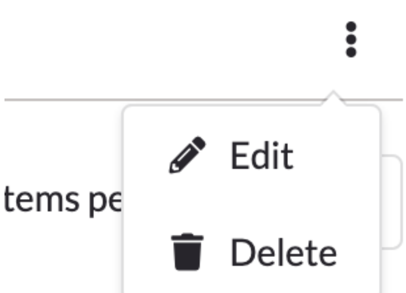
To edit roles:

1. Login to the iENT Application.
2. Click on **Settings > Role Management**.



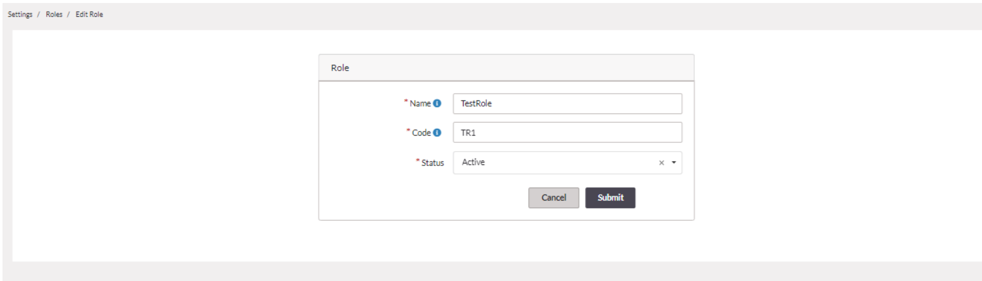


3. Click on any role to edit, or select **Edit** from the kebab menu of any role.



Note: The **Edit** and **Delete** options will be available only for the Org Admin (Buyer Admin) created roles. For the default roles provided in iENT only **Edit** option will be available.

4. The following details of the selected role can be edited:

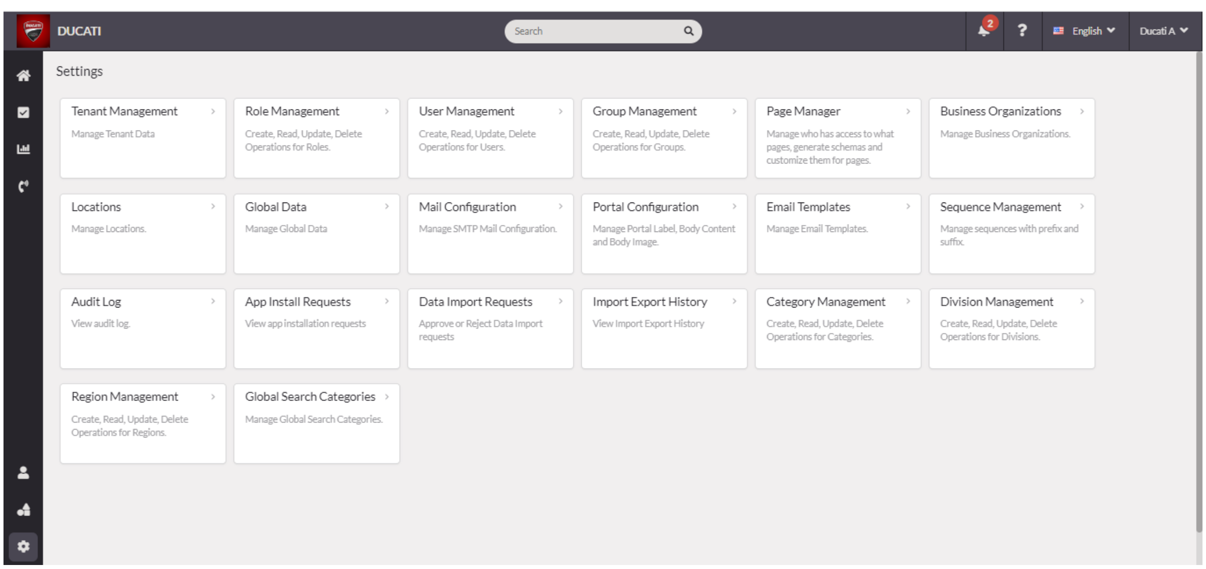


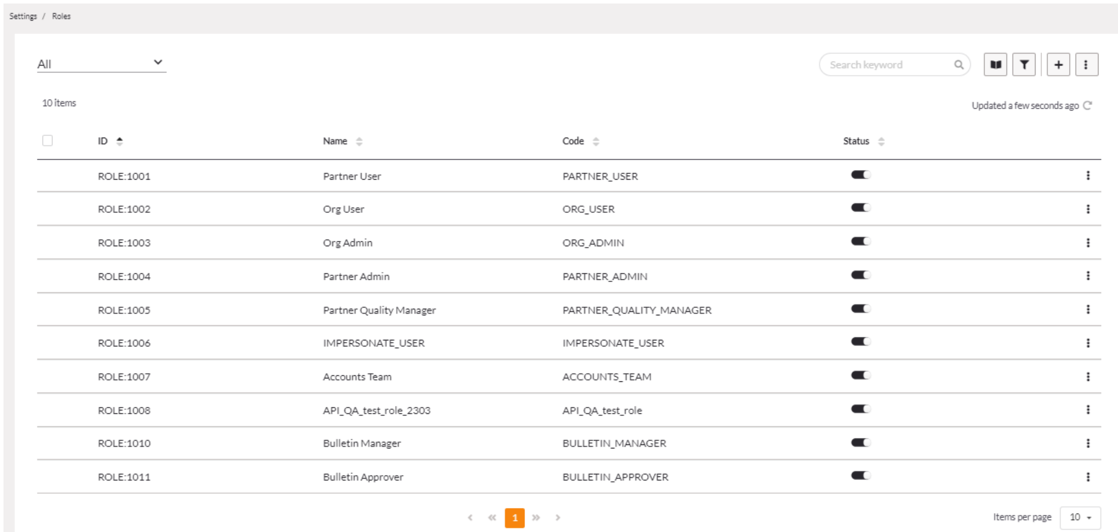
   a. **Name:** Assign a name to the role being edited. Ensure that it is unique in the system.
   b. **Code:** Displays the code value for the role.
      Note: This field cannot be modified.
   c. **Status:** Select the role's status (*active* / *inactive*) from the dropdown.
      Note: Only Org Admin created roles' status can be changed.
5. Click on **Submit.**

Delete Roles

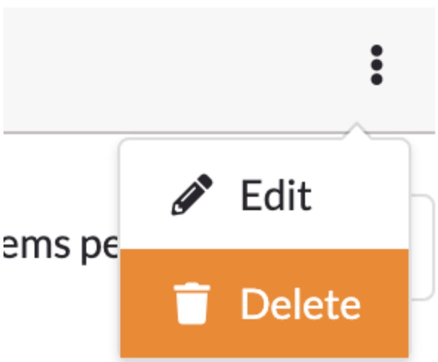
Only Org Admin created roles can be deleted.

To delete a role:
1. Login to the iENT Application.
2. Click on **Settings > Role Management**.



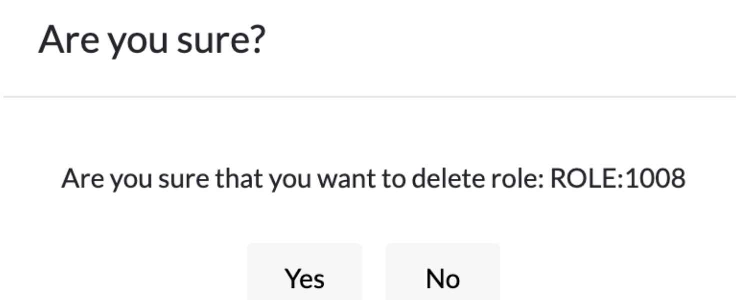


3. This will display all the roles. On the role that you want to delete, click on the kebab menu icon and select **Delete**.



Note: The **Delete** option will be available only for the **Org Admin** (**Buyer Admin)** created roles.

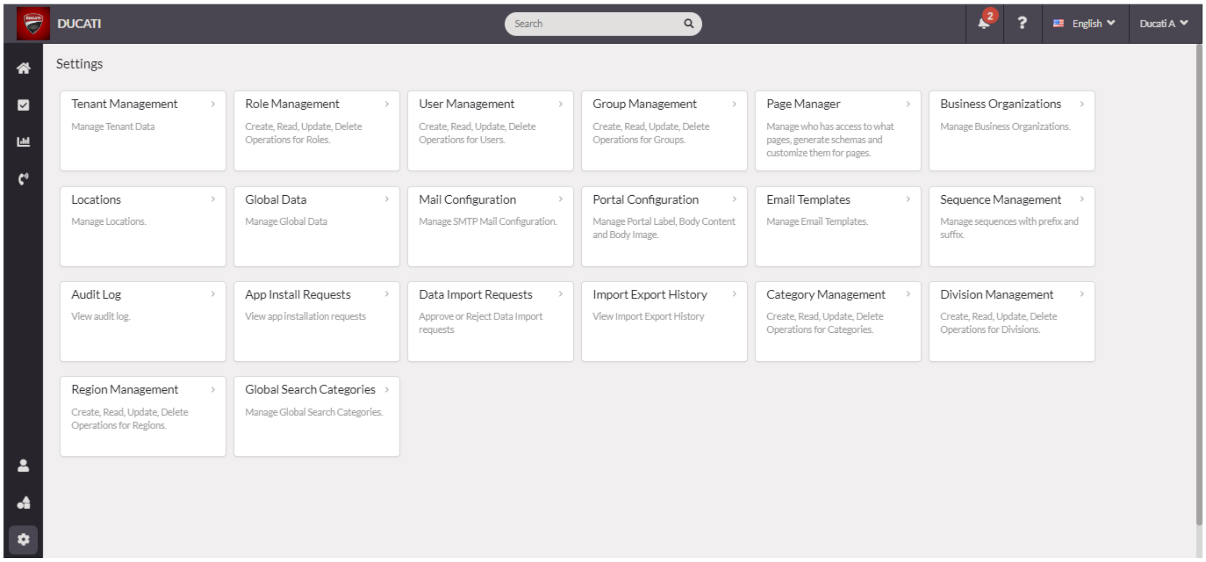
4. Confirm deletion by clicking on **Yes**.

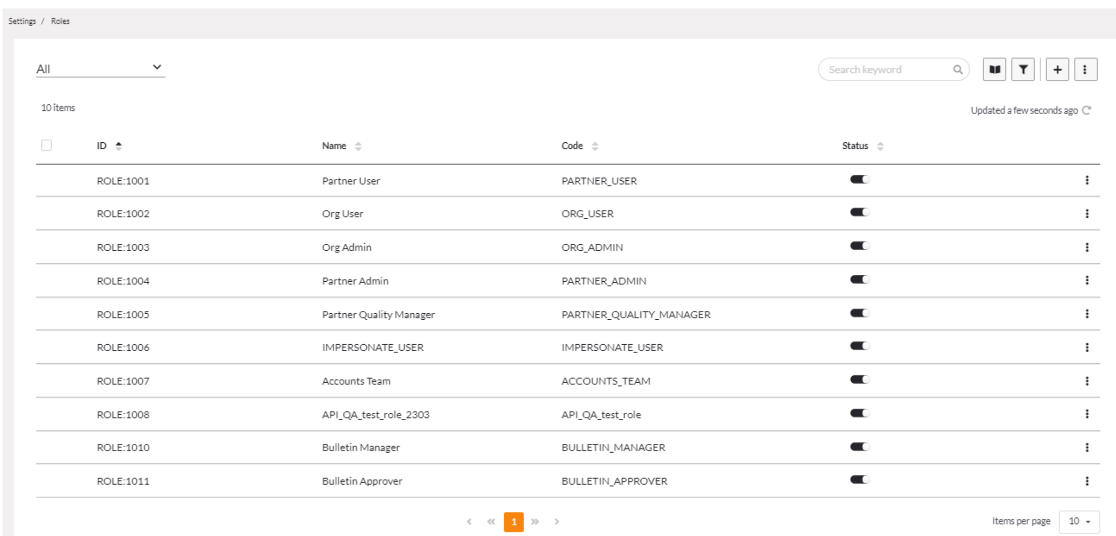


Download and Export Roles

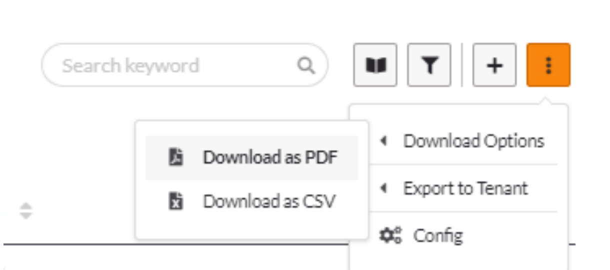
To download a list of roles:

1. Login to the iENT Application.
2. Click on **Settings > Role Management**.



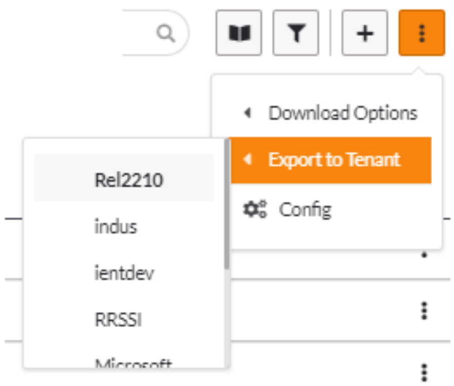


3. Select the roles that you want to download and then click on the kebab menu on the top right corner of the screen and select **Download Options.**



- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

4. To export roles to a specific tenant, click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.



The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

User Management

As the buyer administrator, you have the ability to add users and update their details on the iENT Application. You can also create global users that will have the ability to switch between tenants as required.

In this section, you can perform the following:

- Add Users
- Add Global Users
- View Users
- Impersonate Users
- Download Users
- Delete Users

Add Users

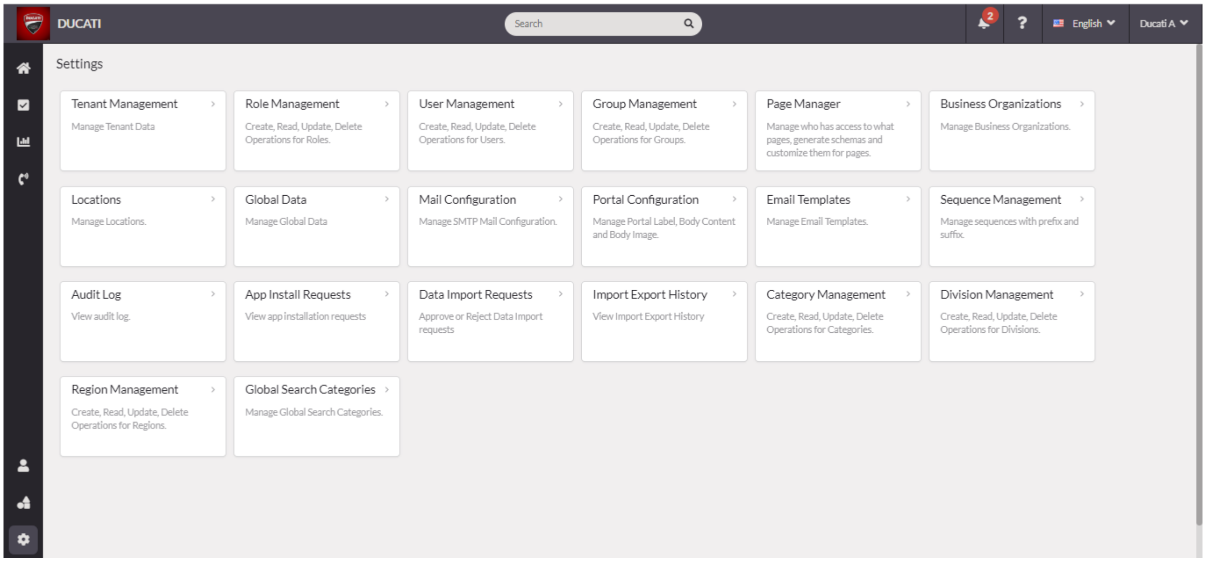
There are several methods by which you can add new users:

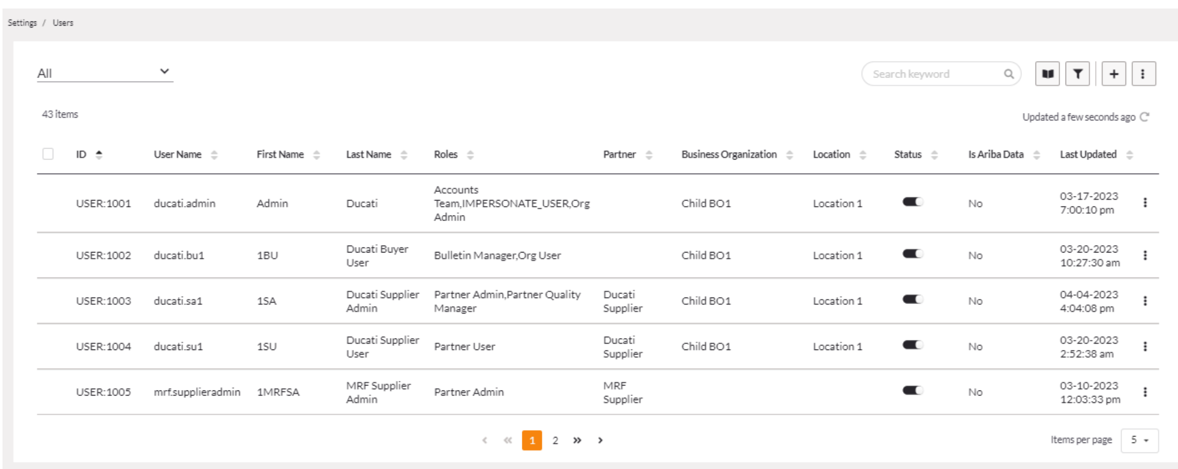
Add New Users *Manually*

To add a user to the system manually:

1. Login to the iENT Application.

2. Click on **Settings > User Management.**





3. Click on the **+** button on the top right corner.
4. Enter the following details of the new *user*:

   - **Username:** This is the new user's username that must be unique in the system.
     Note: This is a mandatory input.
   - **Salutation:** Select a salutation for the user from the dropdown.
     Note: This is a mandatory input.
   - **First Name**
     Note: This is a mandatory input.
   - **Middle Name**
   - **Last Name**
     Note: This is a mandatory input.
   - **Title:** This is the user's title that will be used across customer applications.

- **Email**
  Note: This is a mandatory input.
- **Phone Number**
- **Roles:** Select the user's role from the dropdown. You will be able to select multiple roles such as *Org User, Partner User, Bulletin Manager,* etc.
  On selecting a partner role such as *Partner User* or *Partner Admin,* you will also have to select the name of the Partner.
  Note: This is a mandatory input.
- **Partner:** You can select the partner from the dropdown list. This field is mandatory and available, when you select the user role as Partner User or Partner Admin.
- **Business Organization:** You can select one of your tenant's business organizations from the dropdown.
- **Location:** Based on your selected Business Organization, you will be able to select a location.
- **Status**
  Note: This is a mandatory input.
- **Create User in Keycloak:** If enabled, this user will be created in keycloak as well.

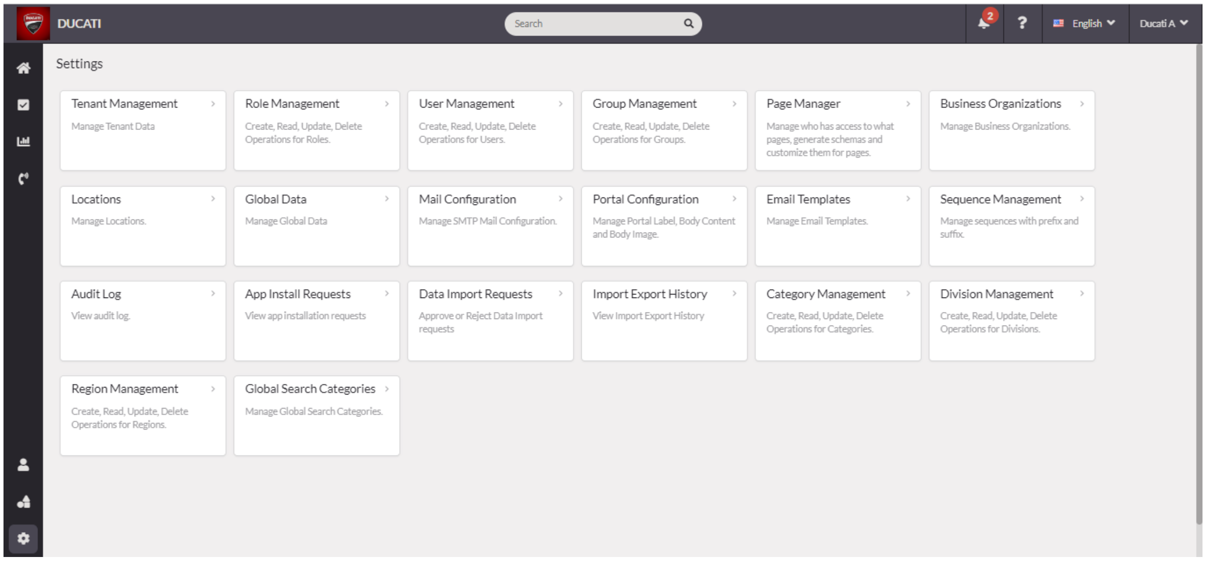
5. Click on **Submit.**

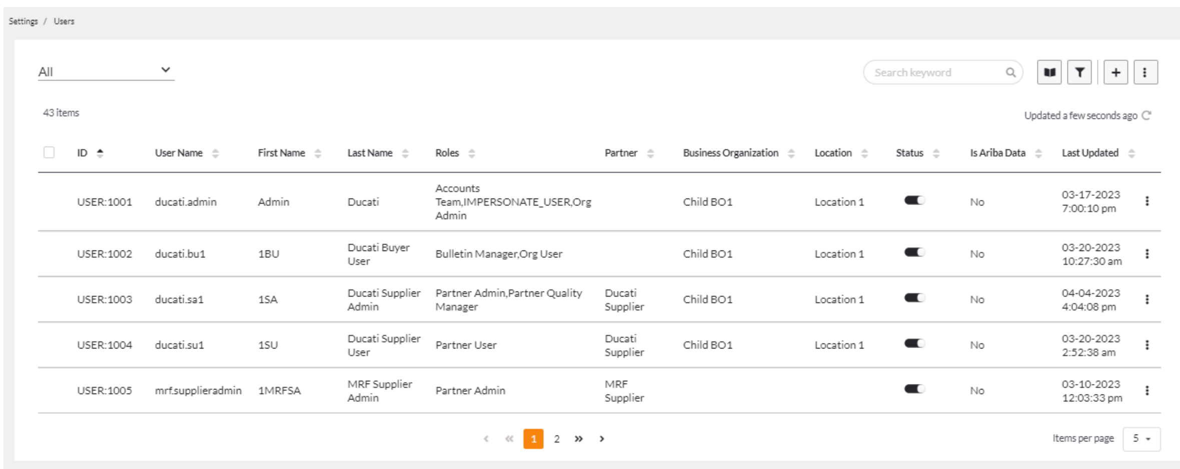
Note: A user created with role as Partner Admin (Supplier Admin), has to login to iENT application and accept the EULA and only then any transactional data that has this user associated with will start displaying it.

Import New Users

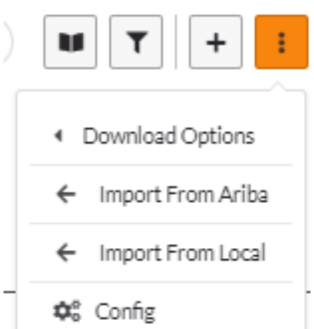
To import new users to the system:

1. Login to the iENT Application.
2. Click on **Settings > User Management**.





3. Click on the kebab menu on the top right corner. There are two options to import new users:



a. **Import from Ariba:** You can import your users from the Ariba portal. *Note: This option will be available only if* External Authorization *has been enabled for your tenant.*
b. **Import from Local:** You can import new users by uploading a file from your local system. When you select this option, a pop-up will prompt you to upload the file

from your local system. Select the file to upload and click on **Submit.**

Create Users in Keycloak

Note: *To be able to manage users on Keycloak, contact the iENT Super Administrator to grant you realm access to manage your tenant users.*

If you have been granted access to the keycloak realm by the Super Administrator, as the Buyer Administrator, you can manage users by using the below URL and logging in with your Buyer Admin credentials:

https://<instance_url>/auth/admin/<realm name>/console

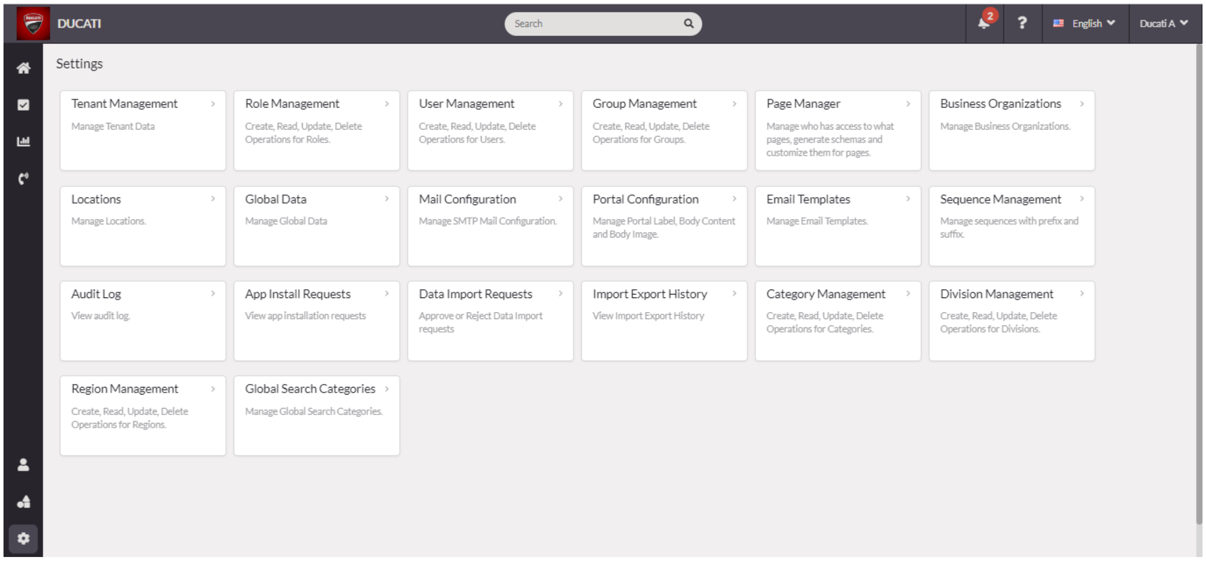
Example: *https://qa.auth.ient.io/auth/admin/microsoft/console*

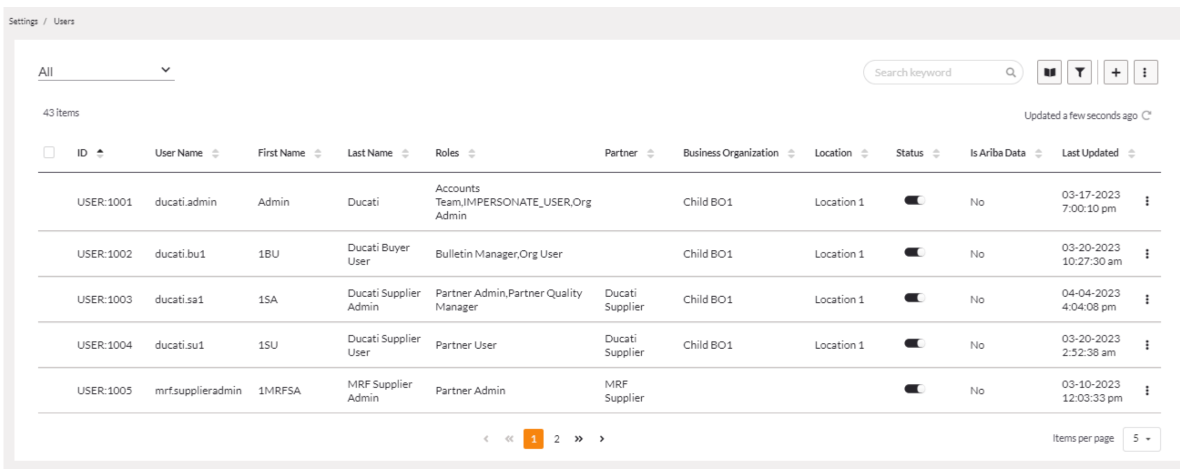
Add Global Users

You have the ability to add global users and update their details on the iENT Application. The global users are created so that such users upon login will have the ability to switch between tenants and the **dashboard**/**My apps** will be displayed as per the selected tenant. An email id is associated with the global user when it is being created and this email is used for subsequent login as a global user.
Let us understand this with the following example.
Suppose you as an Org Admin of tenant A create a global user with email id global.user@example.com. Another Org Admin of tenant B also creates a global user with the same email id global.user@example.com. The other details of the global user created by both Org Adimns can be different, only the email id should be same. Such global user when created will have the option to switch between tenants when logging in to the application.

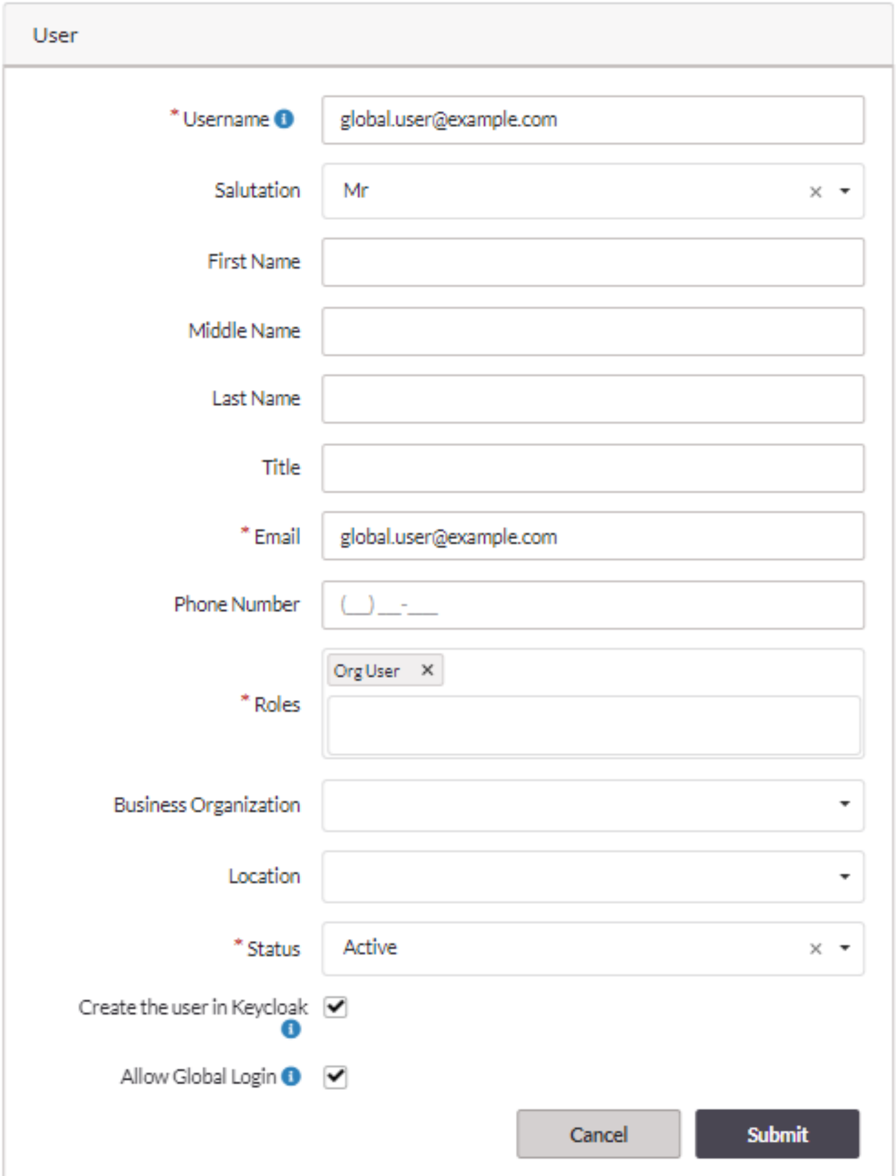
To create a global user:

1. Login to the iENT Application.
2. Click on **Settings > User Management.**





3. Click on the **+** button on the top right corner.



4. Enter the following details of the new *user*:

    - **Username:** Enter the email id that will be associated with the global user being created.
      Note: This is a mandatory input.
    - **Salutation:** Select a salutation for the user from the dropdown.
      Note: This is a mandatory input.
    - **First Name**
      Note: This is a mandatory input.
    - **Middle Name**
    - **Last Name**
      Note: This is a mandatory input.

- **Title:** This is the user's title that will be used across customer applications.
- **Email:** Enter the same email id provided in the **Username** field**.**
  Note: This is a mandatory input.
- **Phone Number**
- **Roles:** Select the user's role from the dropdown. You will be able to select multiple roles such as *Org User, Partner User, Bulletin Manager,* etc.
  On selecting a partner role such as *Partner User* or *Partner Admin,* you will also have to select the name of the Partner.
  Note: This is a mandatory input.
- **Partner:** You can select the partner from the dropdown list. This field is mandatory and available, when you select the user role as Partner User or Partner Admin.
- **Business Organization:** You can select one of your tenant's business organizations from the dropdown.
- **Location:** Based on your selected Business Organization, you will be able to select a location.
- **Status**
  Note: This is a mandatory input.
- **Create User in Keycloak:** If enabled, this user will be created in keycloak as well.
- **Allow Global Login:** If enabled, this user will be able to login as global user and have the option to switch between tenants.

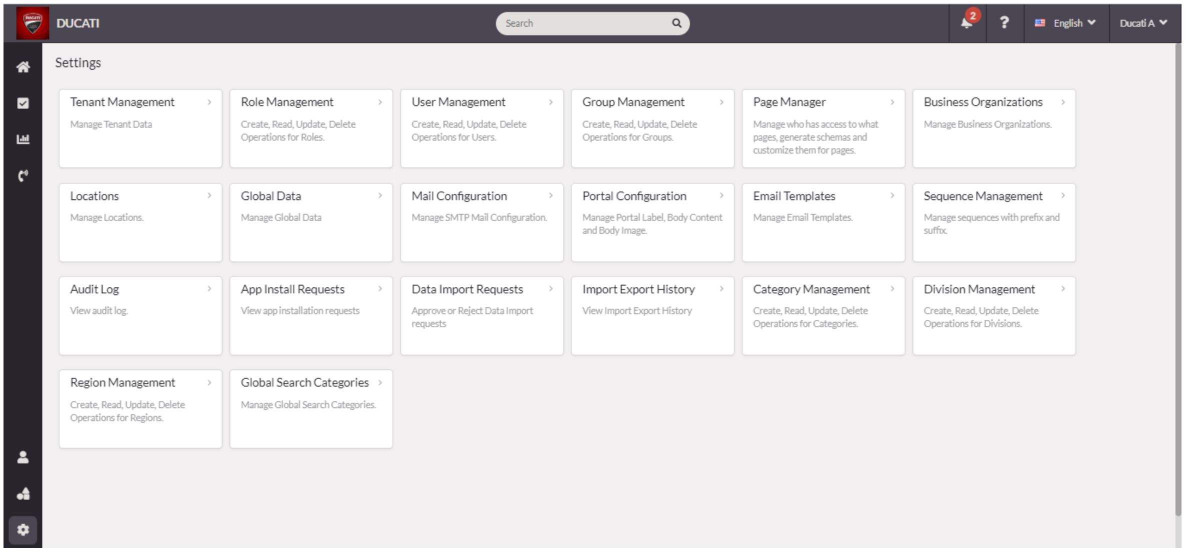
5. Click on **Submit.**

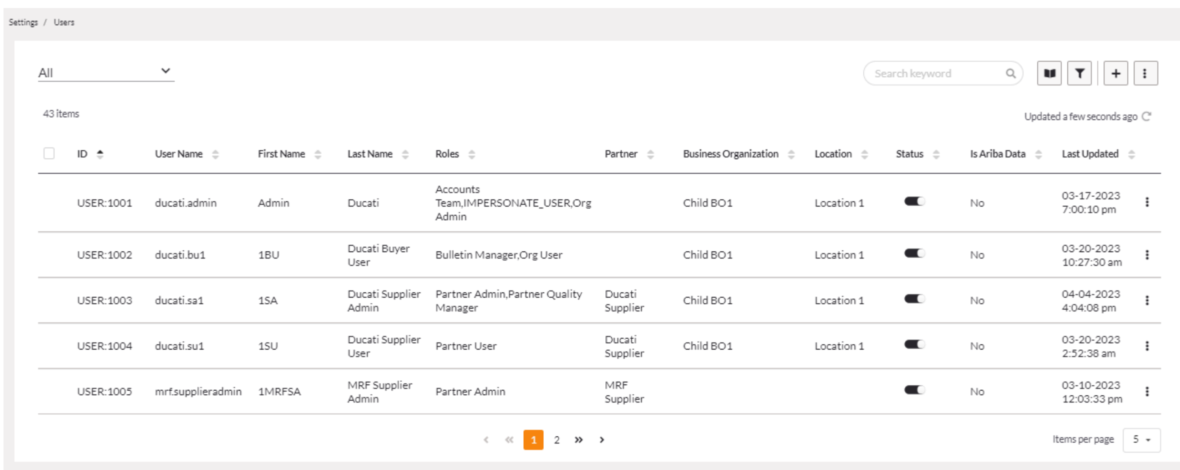
Note: A user created with role as Partner Admin (Supplier Admin), has to login to iENT application and accept the EULA and only then any transactional data that has this user associated with will start displaying it.

View Users

To view all your users:

1. Login to the iENT Application.
2. Click on **Settings > User Management**.





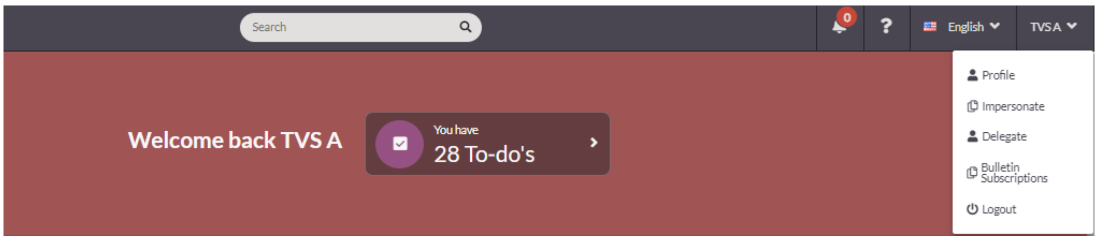
3. The following details of all Users are displayed:
   a. **ID**
   b. **User Name**
   c. **First Name**
   d. **Last Name**
   e. **Email**
   f. **Roles**
   g. **Business Organizations**
   h. **Location**
   i. **Status**
      You can Toggle the status button of any user, to activate or deactivate the said user.
4. See *here* to explore how you can search, view, sort, and filter all the displayed records.

Impersonate a User

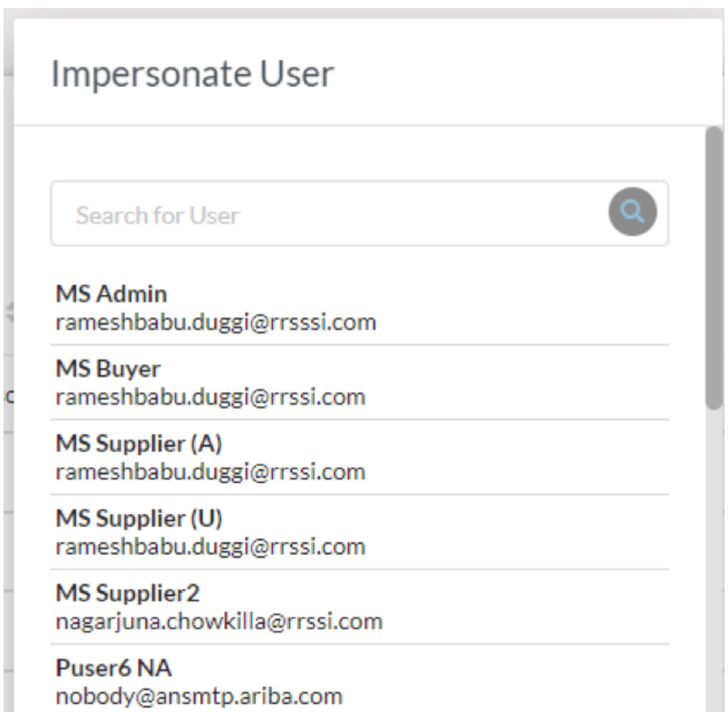
Impersonation is a provision for users to be able to execute operations that use different security information than that which is owned by you. This can be helpful when an application needs to change the security context of a single user instance.

To impersonate another user:

1. Log in to the iENT Application.
2. From the home screen, click on your user name on the top right corner, and select **Impersonate**.



3. Select the user you wish to impersonate from the list, or search for the user from the search bar.

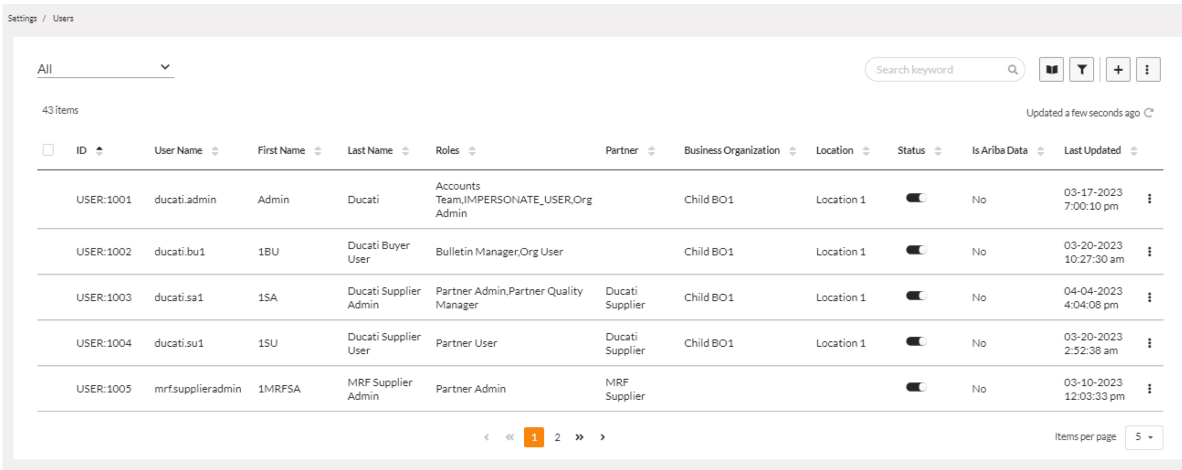


4. On selection of the target user, the application data and usability will now be transformed to that of the impersonated role.

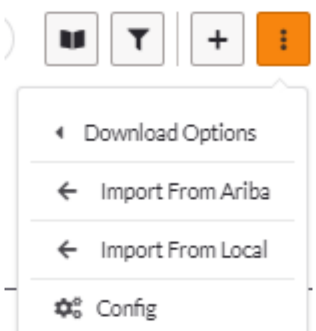
Download Users

To download a list of users:

1. Login to the iENT Application.
2. Click on **Settings > User Management**.



3. Select the users that you want to download and then click on the kebab menu on the top right corner of the screen and select **Download Options**.

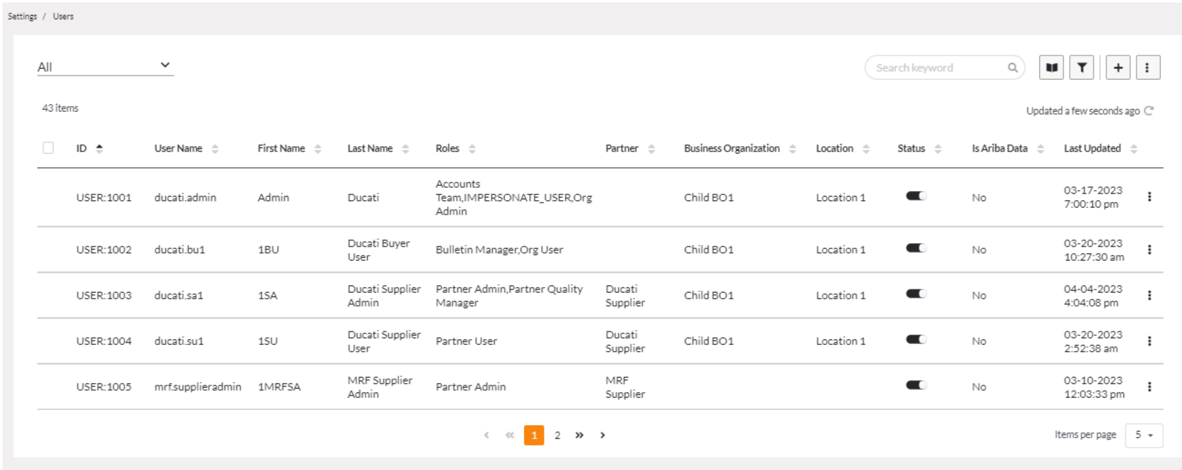


- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

Delete Users

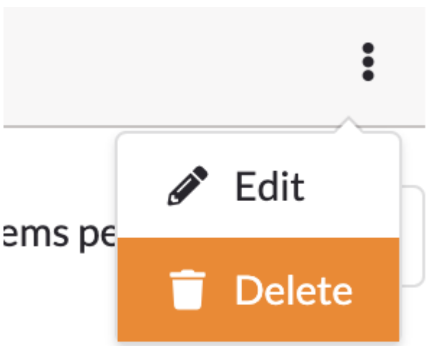
To delete a user:

1. Login to the iENT Application.
2. Click on **Settings > User Management**.

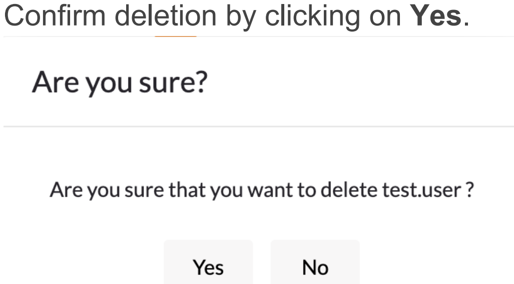


ID	User Name	First Name	Last Name	Roles	Partner	Business Organization	Location	Status	Is Ariba Data	Last Updated
USER:1001	ducati.admin	Admin	Ducati	Accounts Team,IMPERSONATE_USER,Org Admin		Child BO1	Location 1		No	03-17-2023 7:00:10 pm
USER:1002	ducati.bu1	1BU	Ducati Buyer User	Bulletin Manager,Org User		Child BO1	Location 1		No	03-20-2023 10:27:30 am
USER:1003	ducati.sa1	1SA	Ducati Supplier Admin	Partner Admin,Partner Quality Manager	Ducati Supplier	Child BO1	Location 1		No	04-04-2023 4:04:08 pm
USER:1004	ducati.su1	1SU	Ducati Supplier User	Partner User	Ducati Supplier	Child BO1	Location 1		No	03-20-2023 2:52:38 am
USER:1005	mrf.supplieradmin	1MRFSA	MRF Supplier Admin	Partner Admin	MRF Supplier				No	03-10-2023 12:03:33 pm

3. This will display all the created users. On the user that you want to delete, click on the kebab menu icon and select **Delete**.



4. Confirm deletion by clicking on **Yes**.



Group Management

As the Buyer Admin, you can create, view, and manage your organization's groups on the iENT Application.

You can perform the following operations:

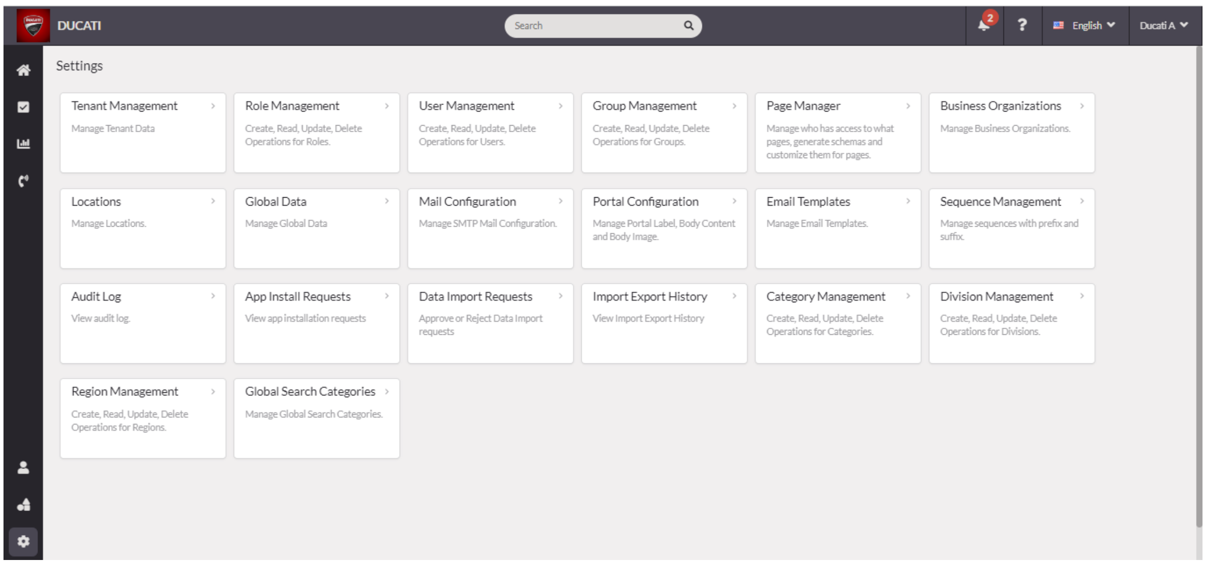
- Create Groups
- View Groups
- Edit Groups
- Delete Groups

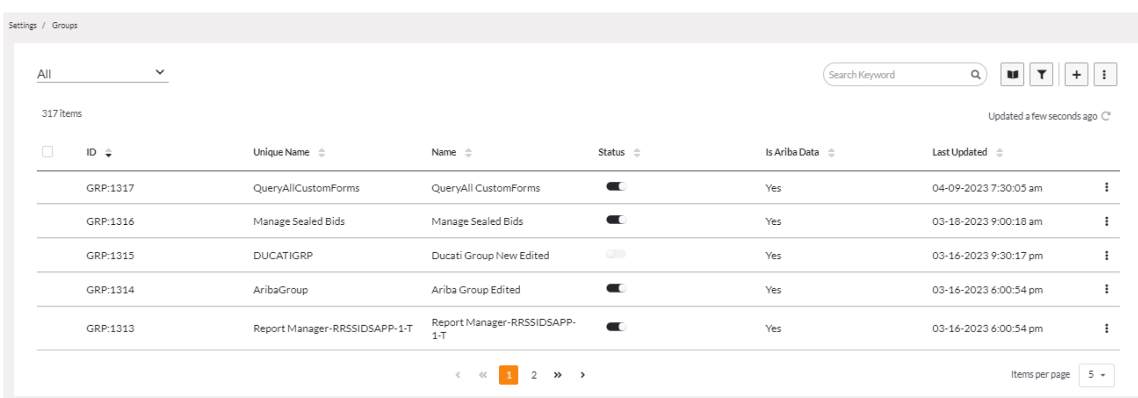
- Download and Export Groups

Create Groups

To create new Groups:

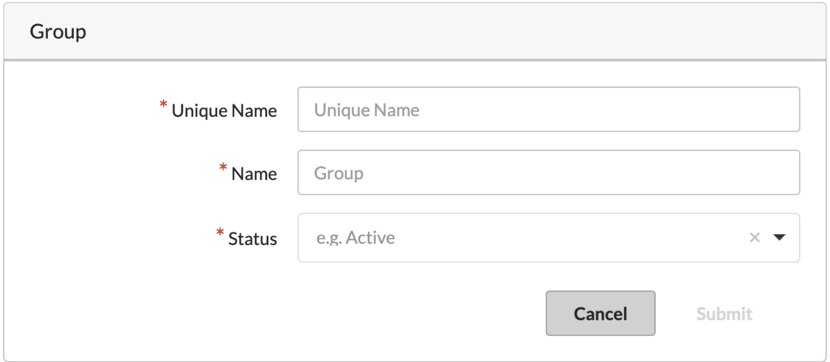
1. Login to the iENT Application.
2. Click on **Settings > Group Management**.





3. Click on the **+** button on the top right corner.

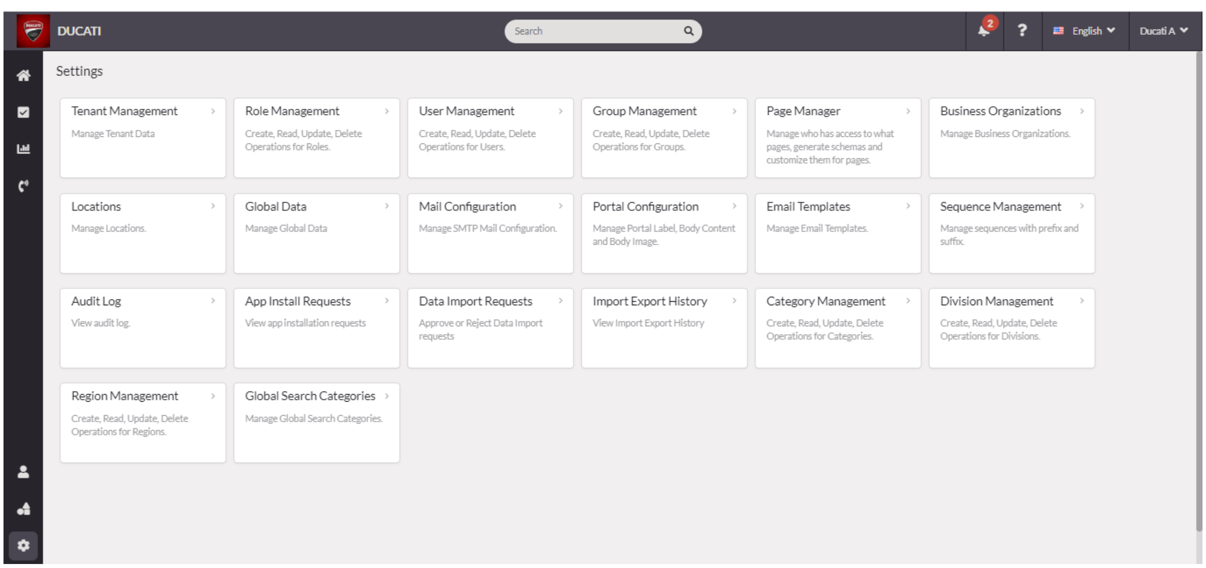
4. Enter the following details of the new Group:

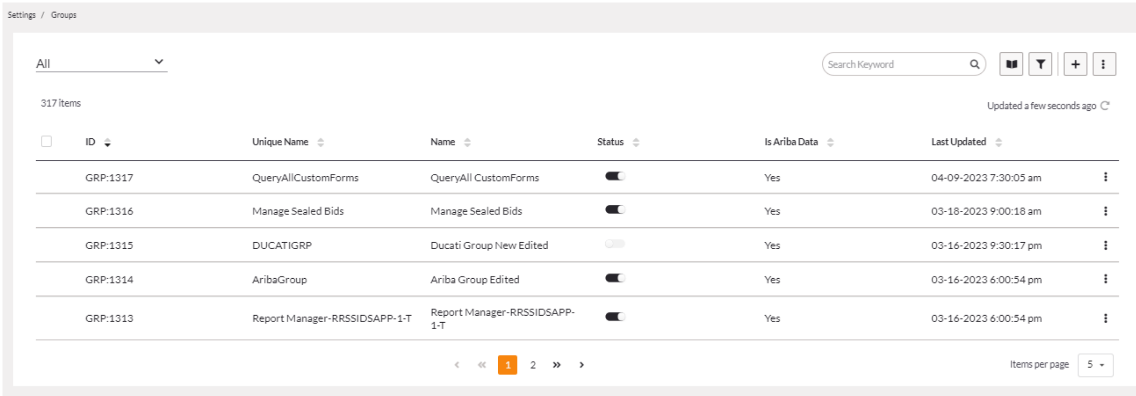


   a. **Unique Name:** Assign a unique name to the new group.
      Note: This is a mandatory field.
   b. **Name:** Enter the new group's name.
      Note: This is a mandatory field.
   c. **Status:** Select the new group's status (*active* / *inactive*) from the dropdown.
      Note: This is a mandatory field.
5. Click on **Submit.**

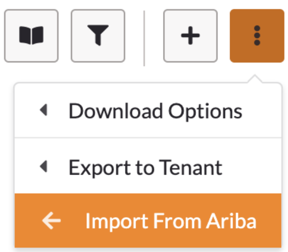
You can also import your groups from SAP Ariba.
To do this:

1. Login to the iENT Application.
2. Click on **Settings > Group Management**.





3. Click on the kebab button on the top right corner and select **Import from Ariba** from the dropdown.

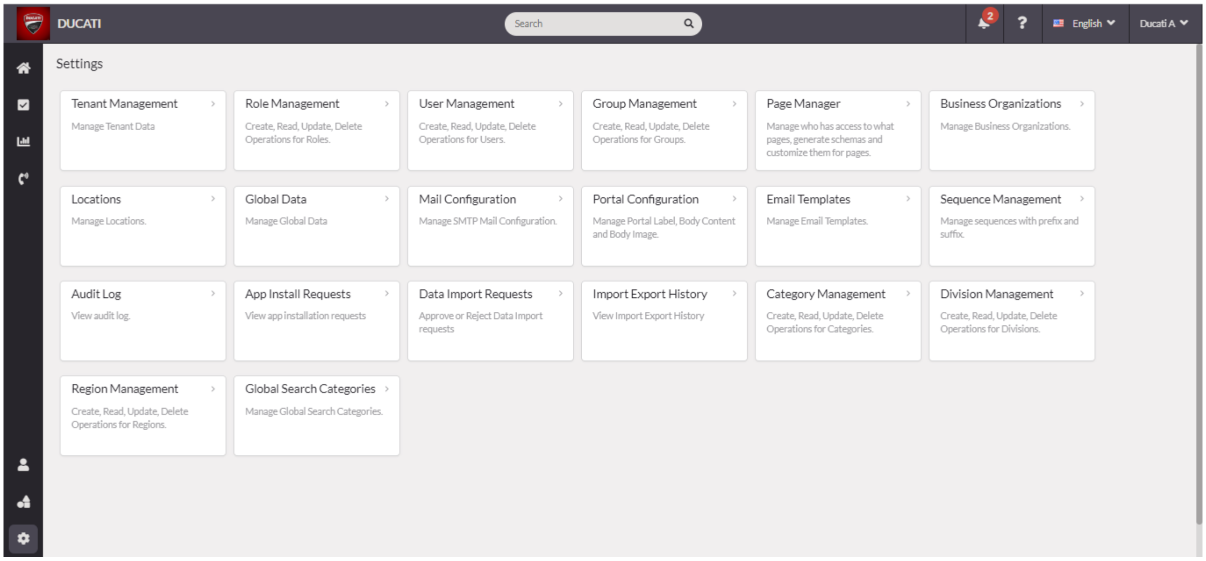


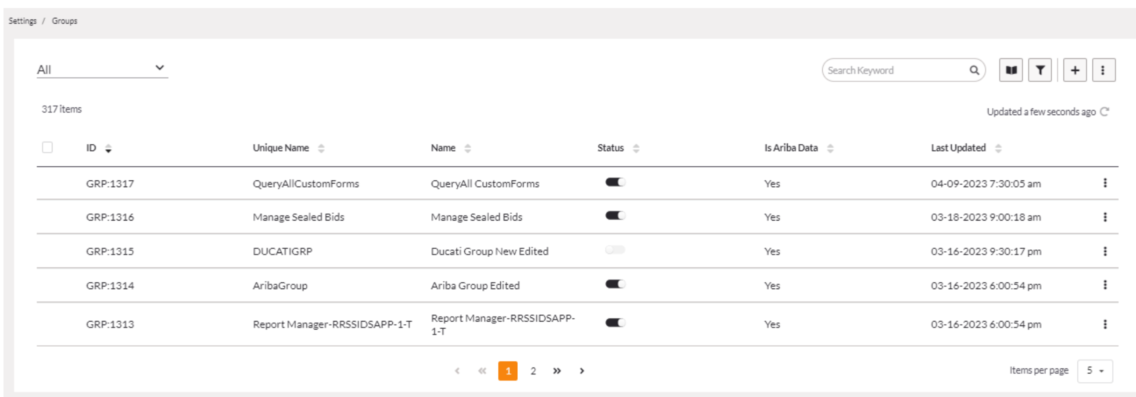
Note: *For the first time, all SAP Ariba groups will be imported into your tenant account. From the next time, groups that are modified in SAP Ariba after the last sync will be imported or updated into your tenant Groups module.*

View Groups

To view all your created Groups:

1. Login to the iENT Application.
2. Click on **Settings > Group Management**.





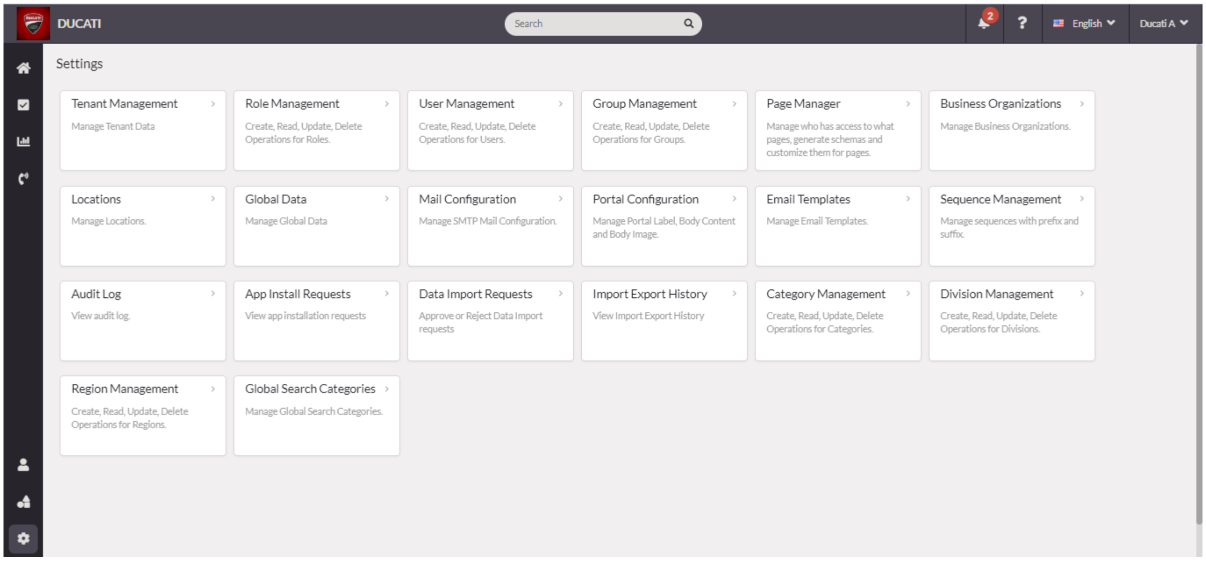
3. The following details of all Groups are displayed:
    a. **ID**
    b. **Unique Name**
    c. **Name**
    d. **Status**
       You can Toggle the status button of any group, to activate or deactivate the said group.

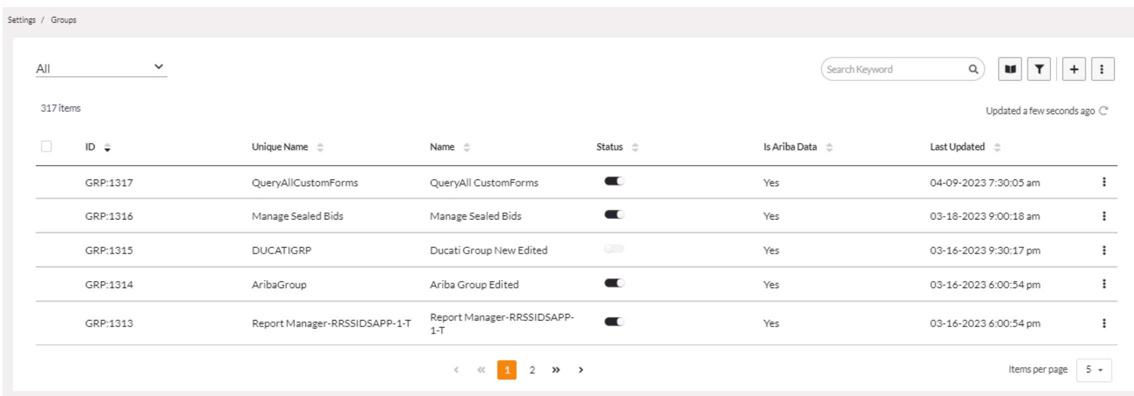
   See *here* to explore how you can search, view, sort, and filter all the displayed records.

Edit Groups

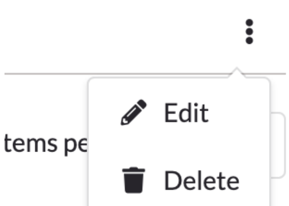
To edit all your Groups:

1. Login to the iENT Application.
2. Click on **Settings > Group Management**.

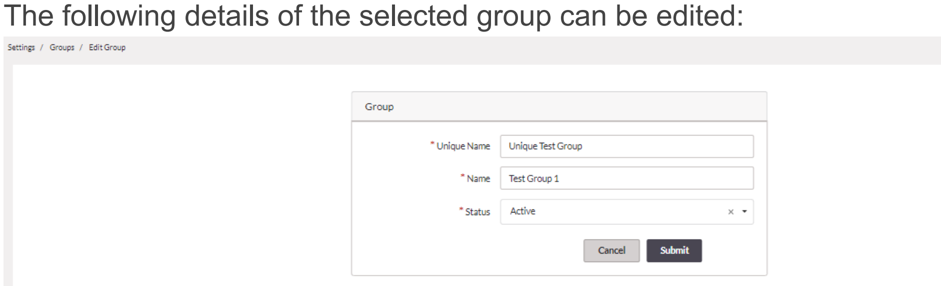




3. Click on any group to edit, or select **Edit** from the kebab menu of any group.



4. The following details of the selected group can be edited:

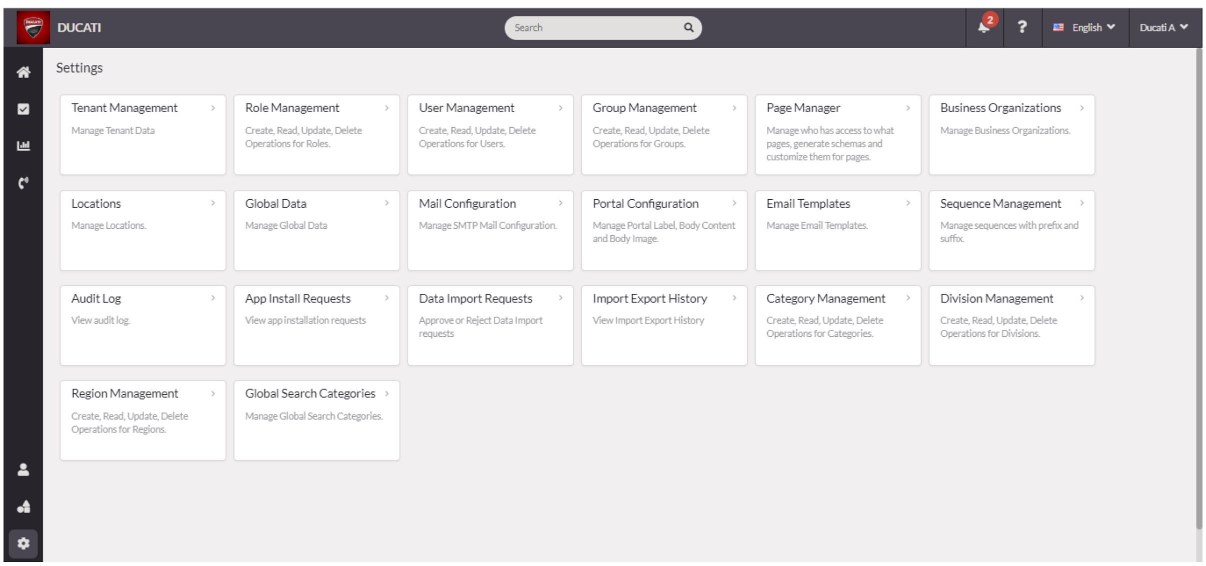


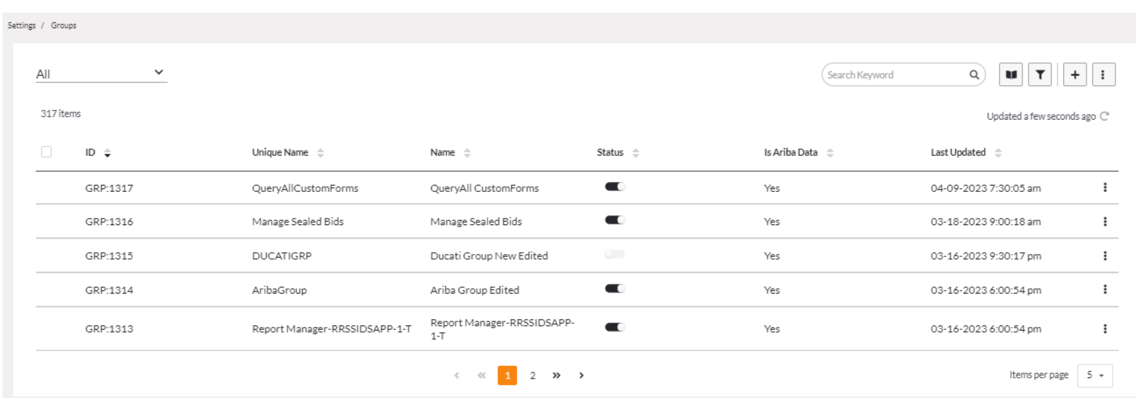
   a. **Unique Name:** Edit the unique name of the group.
   Note: This is a mandatory field.
   b. **Name:** Edit the group's name.
   Note: This is a mandatory field.
   c. **Status:** Select the group's status (*active* / *inactive*) from the dropdown.
   Note: This is a mandatory field.
5. Click on **Submit.**

Delete Groups

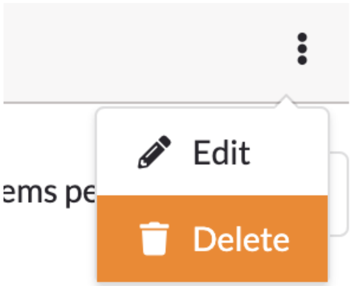
To delete a Group:

1. Login to the iENT Application.
2. Click on **Settings > Group Management**.

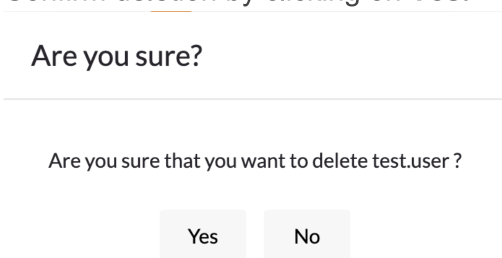




3. This will display all the created groups. On the group that you want to delete, click on the kebab menu icon and select **Delete**.



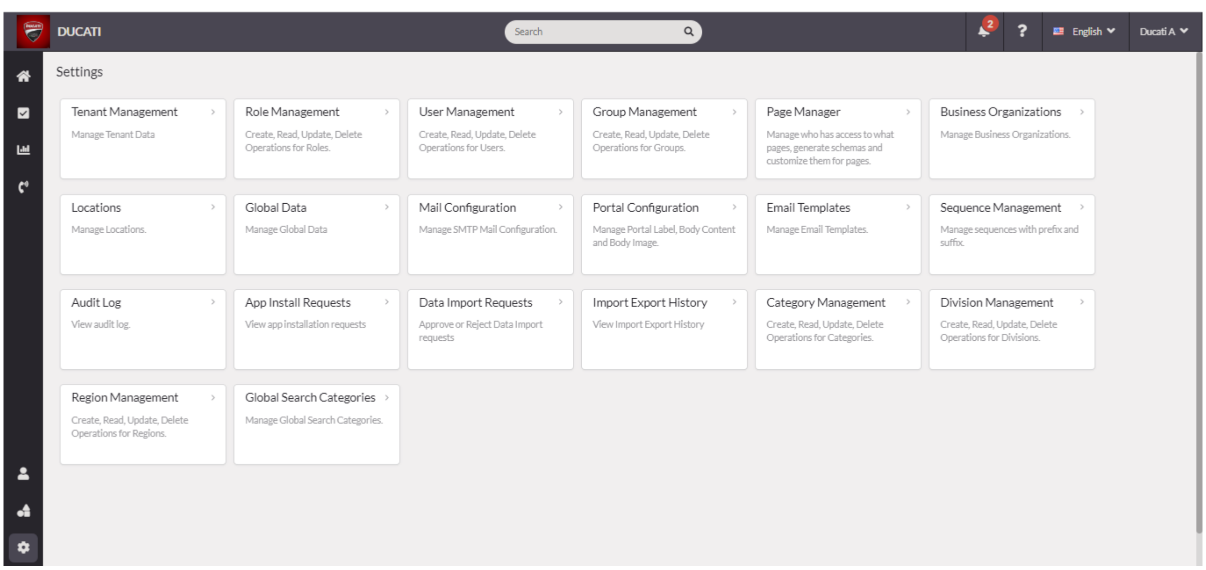
4. Confirm deletion by clicking on **Yes**.

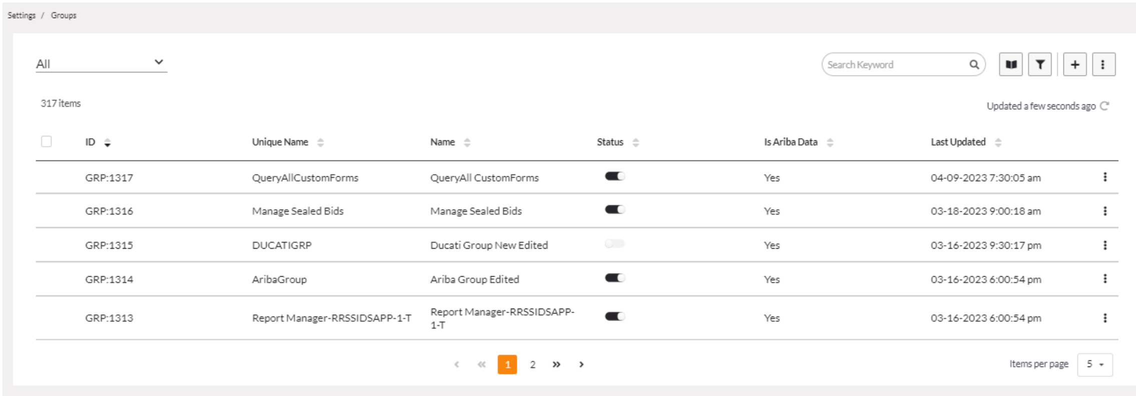


Download and Export Groups

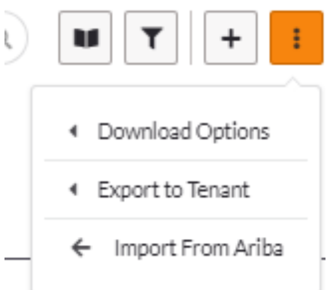
To download a list of groups:

1. Login to the iENT Application.
2. Click on **Settings > Group Management**.



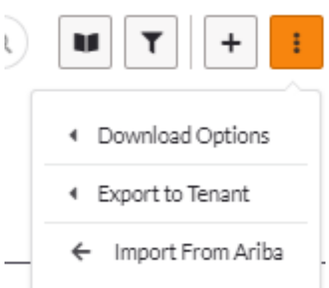


3. Select the groups that you want to download and click on the kebab menu on the top right corner of the screen and select **Download Options**.



   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

4. To export groups to a specific tenant, select the groups and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

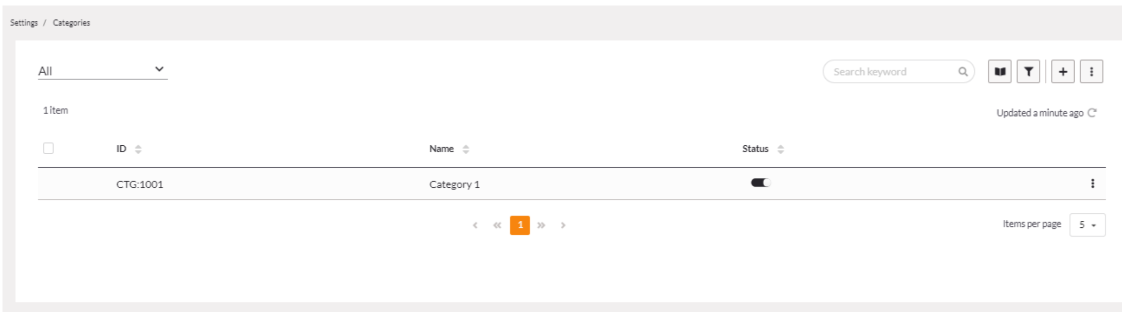


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

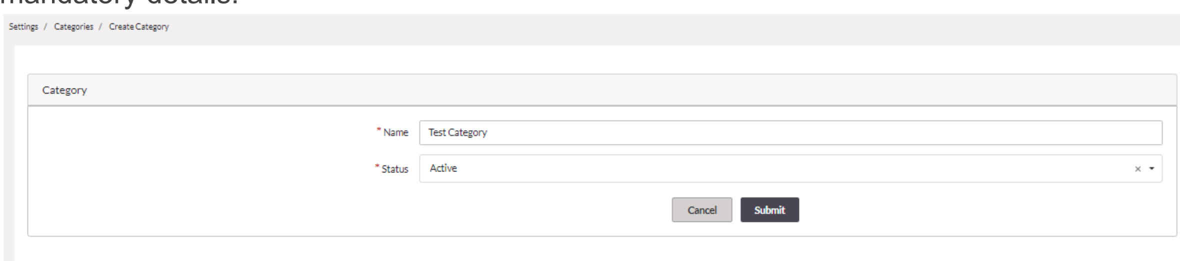
Category Management

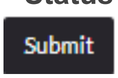
For ease of classification, you create and manage categories on the iENT Application. For example, you may have categories such as *software, hardware, administrative* etc. You can create new categories, view and update existing ones, delete categories, and download or export categories to another tenant within your organization.
To perform these operations:

1. Log in to the iENT Application.
2. Go to **Settings > Category Management**.
   You will be able to view all your existing categories.

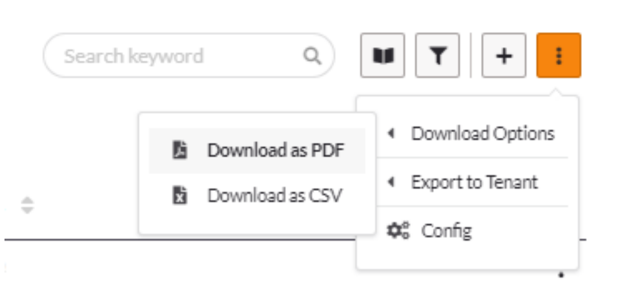


   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add a category, click on the **+ button** on the top right corner, and add the following mandatory details:



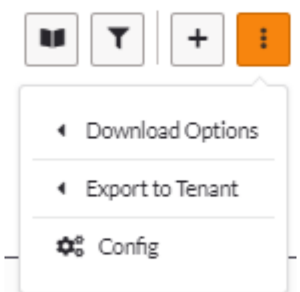
   - **Name**
   - **Status**
4. Click 

.
5. To download a list of categories, select the categories (use **Select All** check box to select all available categories) and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



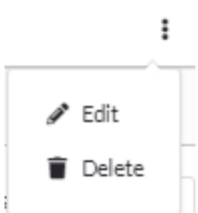
- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

6. To export categories to a specific tenant, select the categories and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

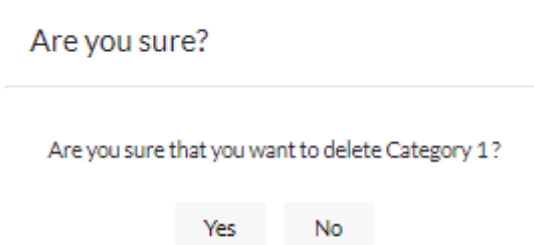


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

7. To delete an existing category, select the particular category and then click on the kebab menu icon of the particular category and select **Delete**.



8. Confirm deletion by clicking on **Yes**.

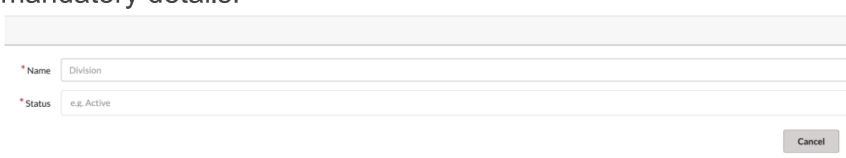


Division Management

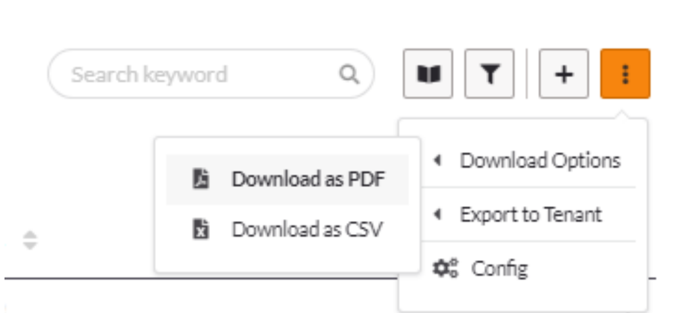
For ease of classification, you create and manage divisions on the iENT Application. For example, you may have divisions such as *mechanical, computer,* etc. You can create new divisions, view and update existing ones, delete divisions, and download or export divisions to another tenant within your organization.
To perform these operations:

1. Log in to the iENT Application.
2. Go to **Settings > Division Management**.
   You will be able to view all your existing divisions.

   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add a division, click on the **+** button on the top right corner, and add the following mandatory details:



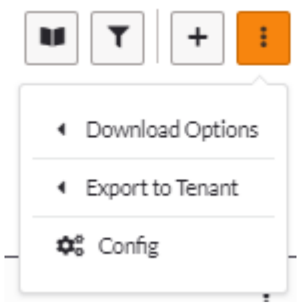
   - **Name**
   - **Status**
4. To download a list of divisions, select the particular division and then click on the kebab menu on the top right corner of the screen and select **Download Options.** You can download the list of divisions as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.

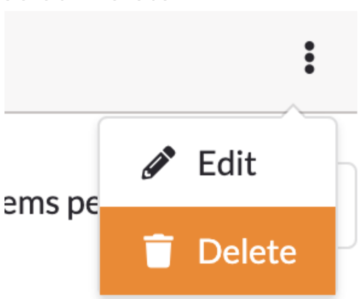
- Download as CSV: Export all the selected records in the data table in CSV format.
-

5. To export divisions to a specific tenant, select the particular divisions and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

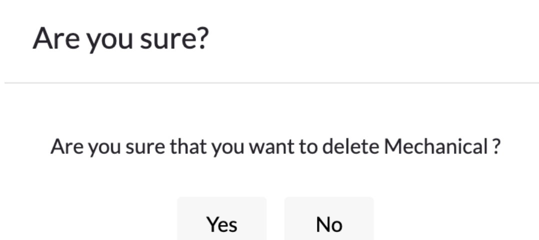


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

6. To delete an existing division, click on the kebab menu icon of the particular division and select **Delete**.



7. Confirm deletion by clicking on **Yes**.

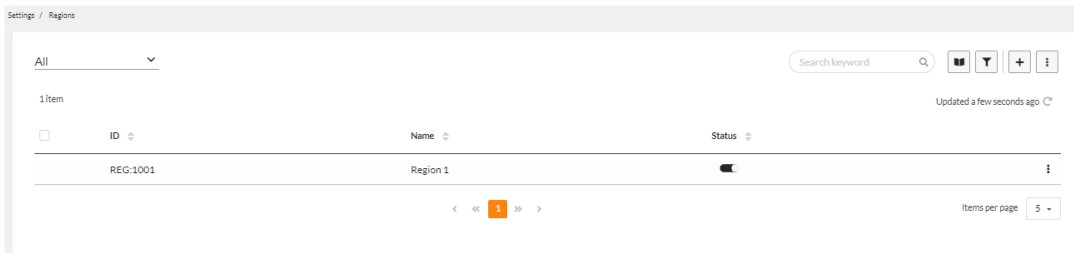


Region Management

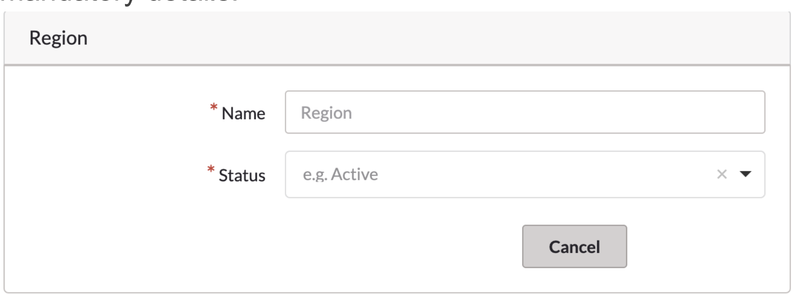
For ease of classification, you create and manage regions on the iENT Application. For example, you may have divisions such as *North America, Latin America, APAC region,* etc. You

can create new regions, view and update existing ones, delete regions, and download or export regions to another tenant within your organization.
To perform these operations:

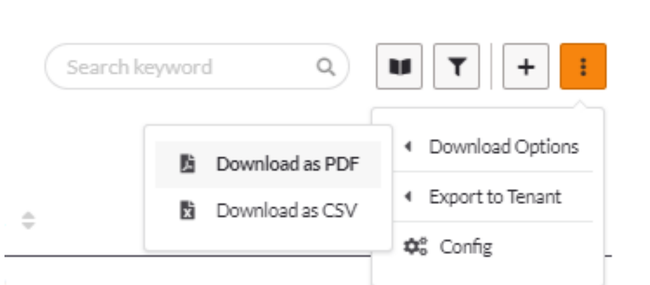
1. Log in to the iENT Application.
2. Go to **Settings > Region Management**.
   You will be able to view all your existing regions.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add a region, click on the **+** button on the top right corner, and add the following mandatory details:

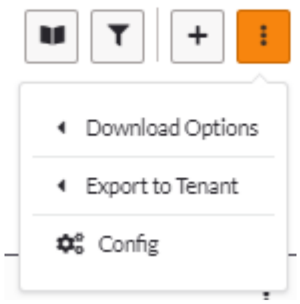


   - **Name**
   - **Status**
4. To download a list of regions, select the particular regions and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



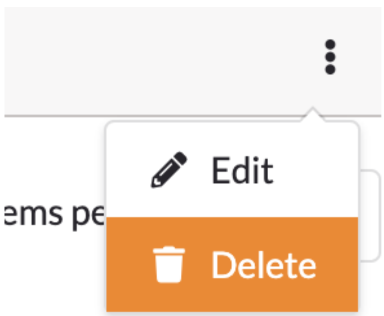
   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

5. To export regions to a specific tenant, select the particular regions and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

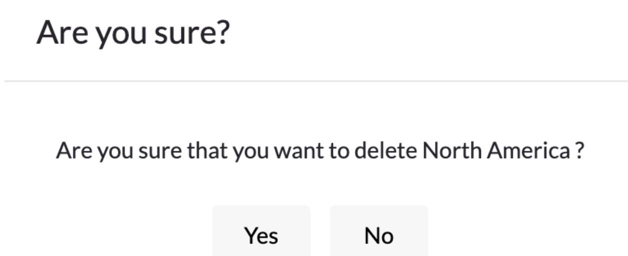


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

6. To delete an existing region, click on the kebab menu icon against the particular region and select **Delete**.



7. Confirm deletion by clicking on **Yes**.



Manage Applications

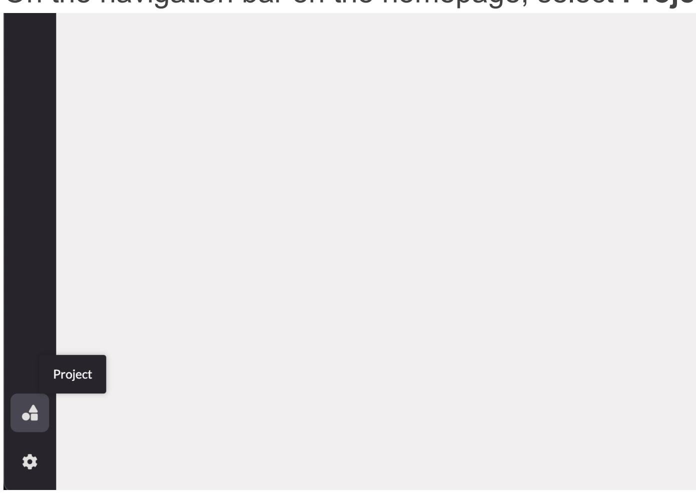
The iENT application is a powerful platform that not only offers you robust features to enable end-to-end administrative operations, but also enables you to build your own applications to further fine-tune the solution according to your requirements. A Buyer Administrator's primary function is to provide a base structure for all buyer and supplier users by managing these various applications needed by the organization. You can create and edit these applications on the iENT platform as required.

This section explores all the following features offered by iENT's App builder:

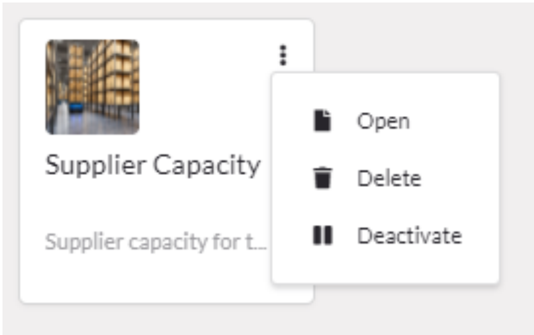
- **View and Manage Apps**
- **Activating and Deactivating an App**
- **Create or Upload New Apps**
- **Edit Applications**
- **Provide Attachment in Forms**

View and Manage Apps

To view and manage your existing apps:

1. Log in to the iENT Application.
2. On the navigation bar on the homepage, select **Project.**


This page will display all your existing applications.
3. Click on the kebab menu on each app's tile to open, delete or deactivate the selected application.

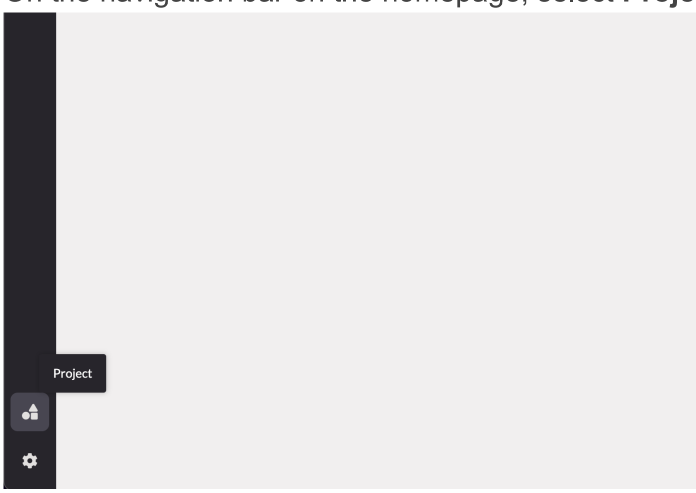


Activating and Deactivating an App

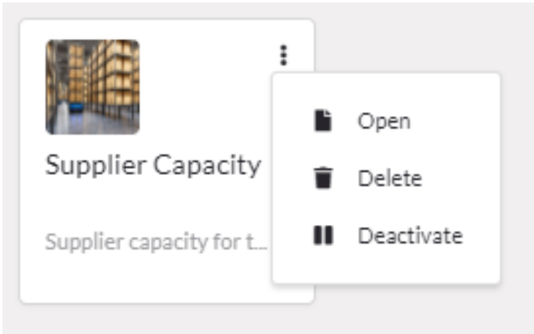
The iENT application allows the Buyer Administrator to activate and deactivate an app installed from the marketplace or an iENT app created by the Buyer Administrator. Deactivating an application hides the application and its related data from all tenant users who have access to the particular application. The data of a deactivated app will not be displayed even in any search query, report, dashboard, notifications, or To-dos.

To deactivate an existing app:

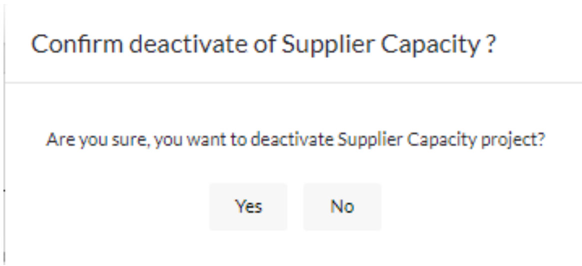
1. Log in to the iENT Application.
2. On the navigation bar on the homepage, select **Project.**



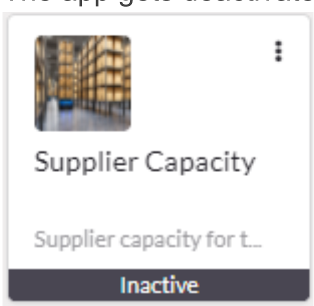
3. This page will display all your existing applications.
4. Click on the kebab menu (three-dot) on the app's tile that you want to deactivate and click **Deactivate**.



The following message is displayed.



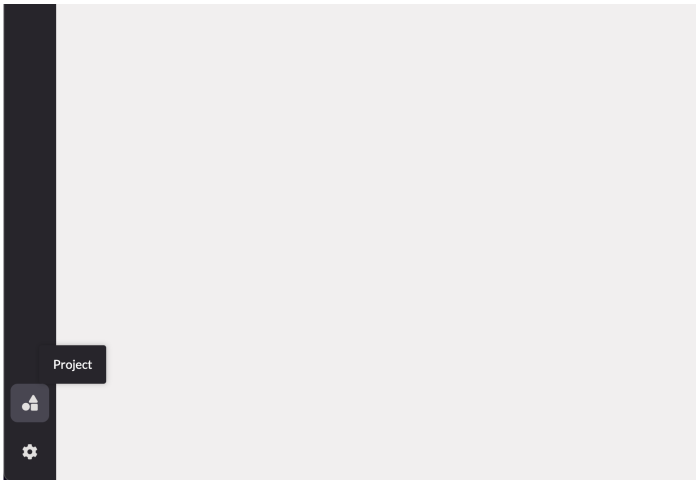
5. Click **Yes**.
   The app gets deactivated and is marked as **Inactive**.



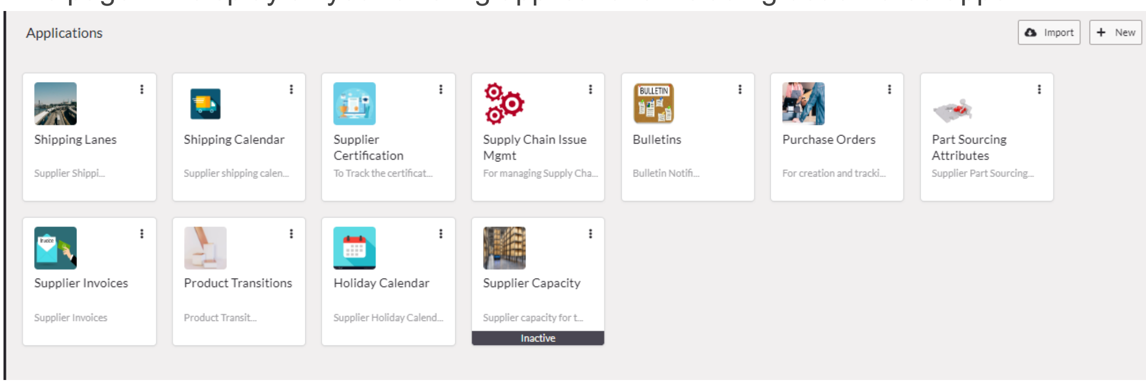
Note: On making an app inactive, it will be not be visible in the **My Apps** tab in **homepage**.

To activate a deactivated app:

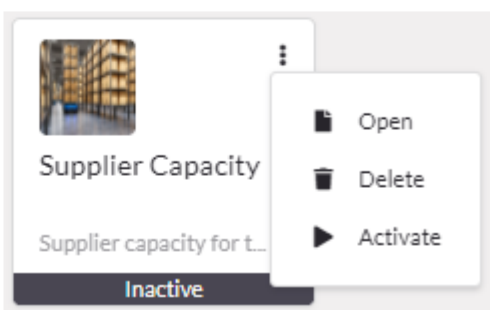
1. Log in to the iENT Application.
2. On the navigation bar on the homepage, select **Project**.



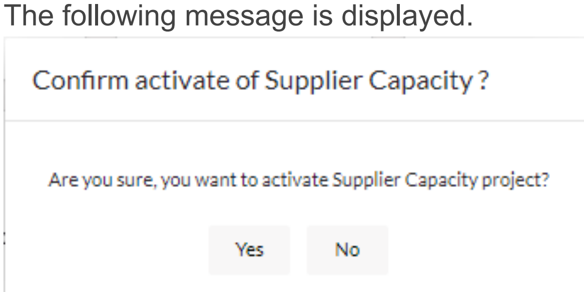
This page will display all your existing applications including deactivated apps.



3. Click on the kebab menu (three-dot) on the app's tile that you want to activate and click **Activate**.



The following message is displayed.



4. Click **Yes**.

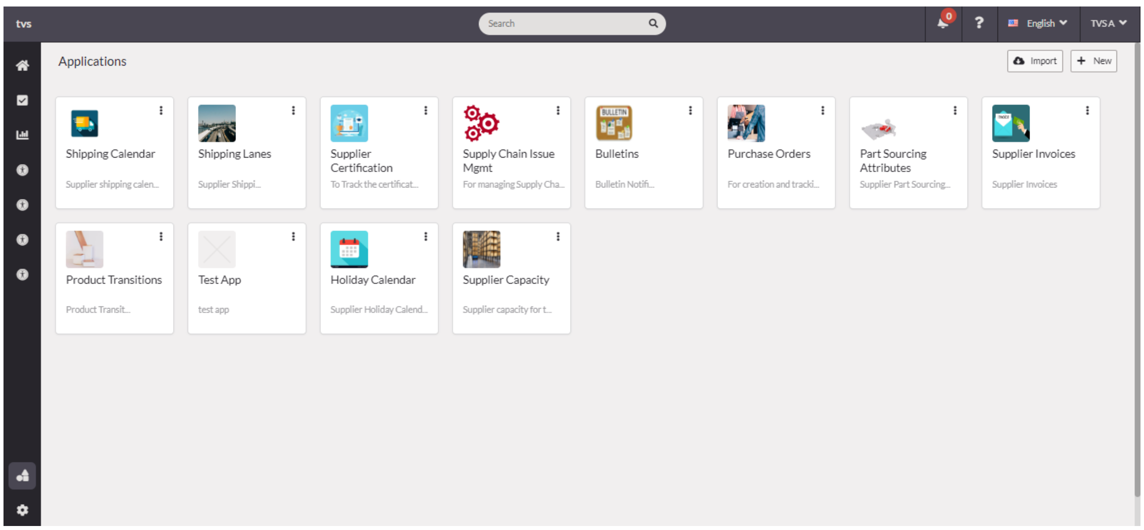
The app gets activated.

Note: On activating the app, it will be visible to all users that have access to it and the data of this particular app will appear in any search query or report.

Create or Upload New Apps

To create a new application:

1. Log in to the iENT Application.
2. On the navigation bar on the home page, select **Project**.



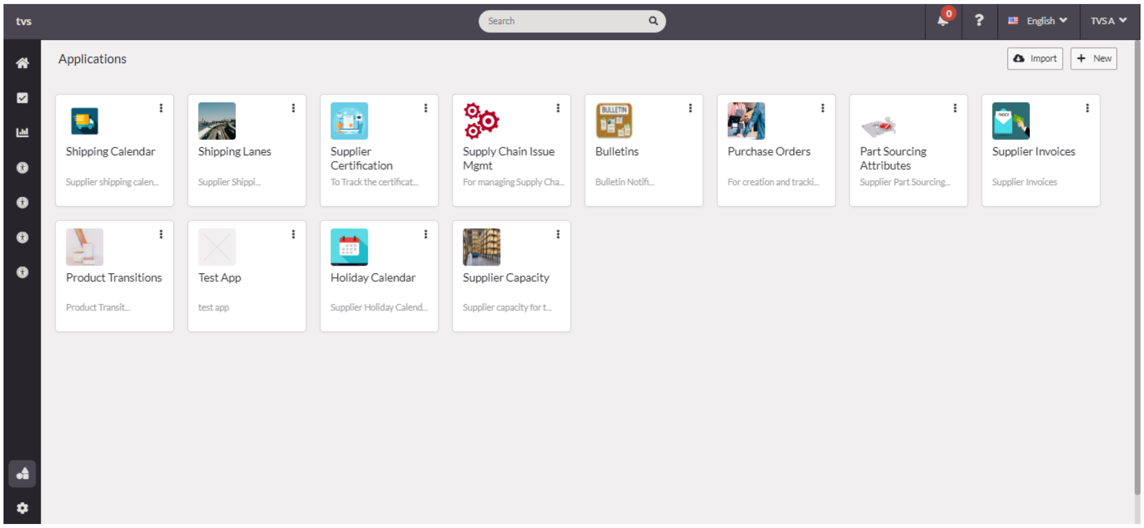
3. To create or upload a new application, you can
    - Click on the **Import** button to upload an rjson file of your new application.
    - Click on the **+ New** button to create an empty application and follow the steps in the Edit Application section.
4. Click on **Save.**

Note*: iENT Applications can be exported, so that the same application can be imported to other tenants. The exported application will be encrypted and can be saved locally in the form of rjson.*

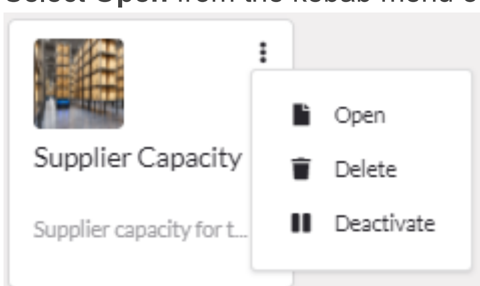
Edit Application

To edit an application:

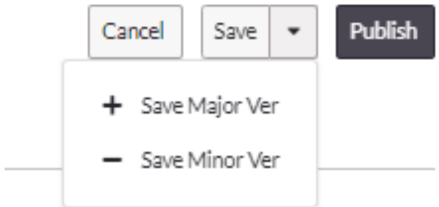
1. Log in to the iENT Application.
2. On the navigation bar on the homepage, select **Project**.



3. To edit the details of an application:
   - Click on the application tile, or
   - Select **Open** from the kebab menu of the application tile.



4. You can perform the following actions on the application:
   - **Publish:** This publishes the current version of the application to the marketplace.
   - **Save:** This saves all the current details, settings and configurations of the application.
   - **Save Major Ver:** This creates the Major Version of the application.
   - **Save Minor Ver:** This creates the Minor Version of the application.
   - **Cancel:** This will navigate back to the App Builder Home screen.

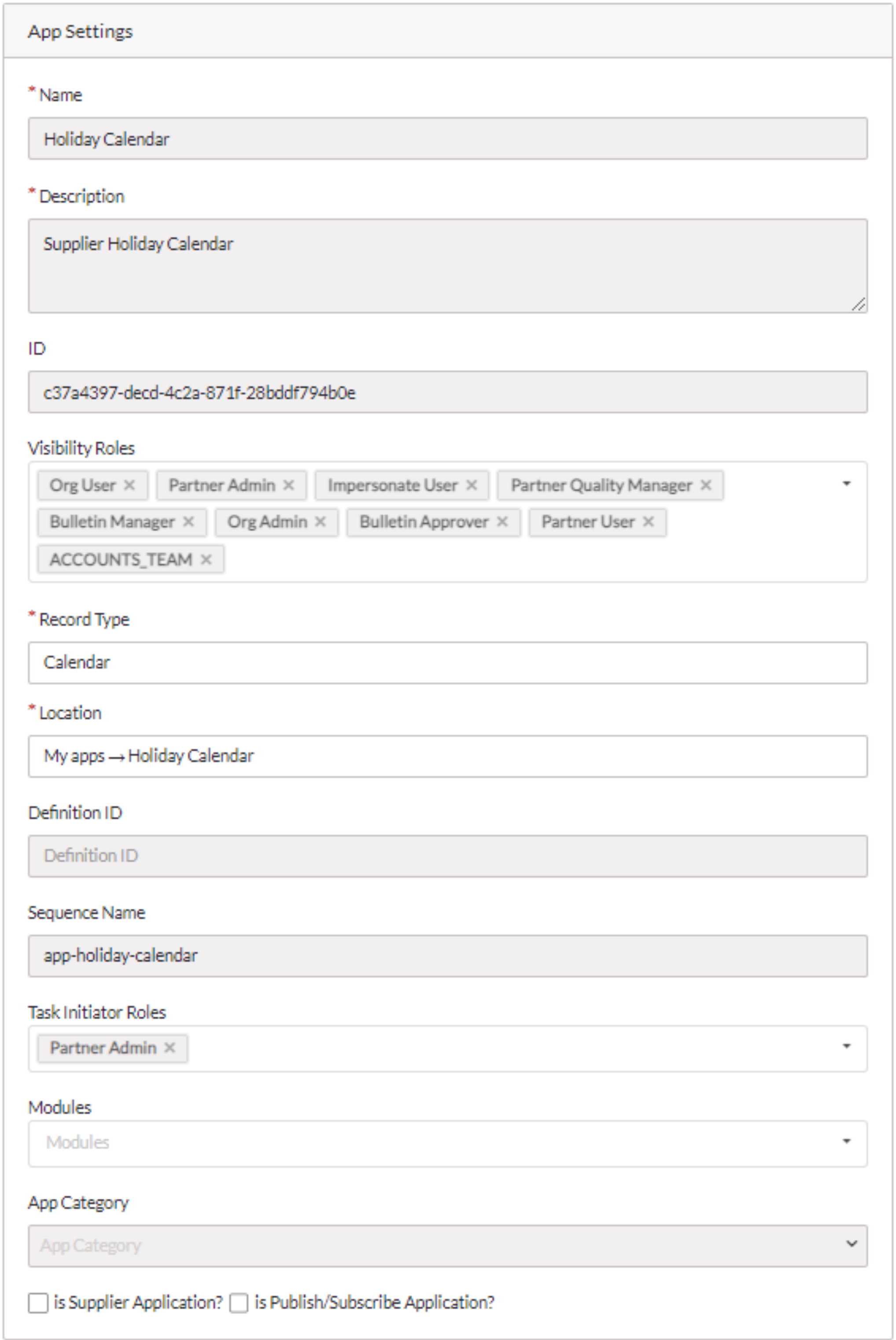


5. The following details of the application can be edited:
    - App Settings
    - Tags
    - Forms
    - Email Templates
    - SLA Definition
    - Deploy Config
    - Versions
    - Translations
    - Status
    - Global Search Config
    - Workflow

   Note: Click either of the options **Save**, **Save Major Ver** or **Save Minor Ver** (as required) to enable the edit mode of the application.

App Settings

This page contains the basic details of the application as follows:


App Settings

* Name
Holiday Calendar

* Description
Supplier Holiday Calendar

ID
c37a4397-decd-4c2a-871f-28bddf794b0e

Visibility Roles
Org User × Partner Admin × Impersonate User × Partner Quality Manager ×
Bulletin Manager × Org Admin × Bulletin Approver × Partner User ×
ACCOUNTS_TEAM ×

* Record Type
Calendar

* Location
My apps → Holiday Calendar

Definition ID
Definition ID

Sequence Name
app-holiday-calendar

Task Initiator Roles
Partner Admin ×

Modules
Modules

App Category
App Category

is Supplier Application? is Publish/Subscribe Application?

- **Name:** The application's name. This name cannot be changed once created.
  Note: This is a mandatory field.
- **Description:** A basic description of your application.
  Note: This is a mandatory field.
- **ID:** This is the Project ID which is automatically generated and cannot be edited.
- **Visibility Roles:** This field displays the roles that have access to this application.
- **Record Type:** The type of record this application has. This field is auto-generated for the applications installed from the marketplace.
- **Location:** This field displays the location of this application. This field is auto-generated for the applications installed from the marketplace.
- **Definition ID:** This is the workflow deployment ID that is automatically generated.
- **Sequence Name:** This is the sequence name that is automatically generated. See Sequence Management for more information.
- **Task Initiator Roles:** These are the roles that have the permission to create a task.
- **Modules:** Displays the Global Data modules that can be selected from the dropdown list as applicable for the app.
- **App Category:** This field displays the category of the app, such as Customer Service, Sales and Marketing while it was created. The owner of the app can only change the app category when the new version of the app is created. The new app categories will reflect when Admin installs the latest version of app from the Marketplace.
- **Is Partner Application?:** Checking this box will mark the application as a partner application.
- **Is Publish/Subscribe Application:** Checking this box will mark the application as a subscription type.

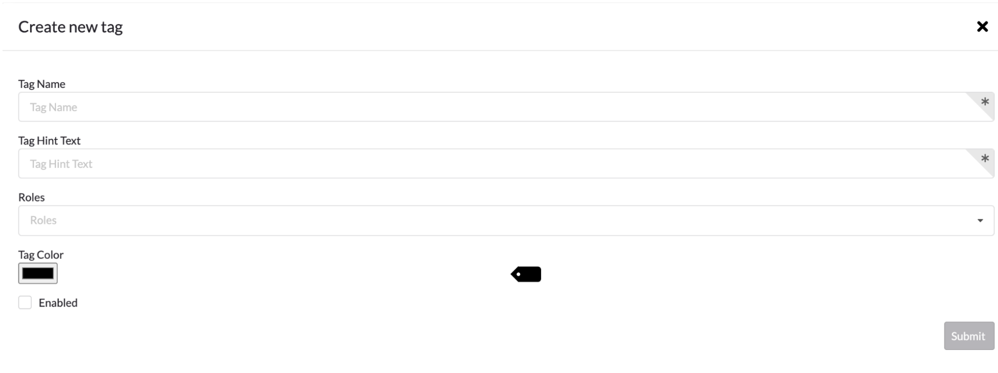
To add or change an icon, click on the button on the icon space and ensure that you upload an image that is below 100kb.

Tags

An application's tags help you control visibility for the application's conversations, attachments, etc. across the tenant. You can create tags only for the apps other than the default apps provided in iENT application.

To create a new tag:

1. in the tag section, click on the **+** button and add the following details:



    - **Tag Name:** Give your tag a name.
    - **Tag Hint Text:** Add a hint text for your tag.
    - **Roles:** Select the user roles to which you want your application content to be visible.
    - **Tag Color:** Select the tag color by clicking on the tag color selection box. Default color is black.
    - **Enabled:** Selecting this button will set the tag as *enabled.*
2. Click on **Submit.**

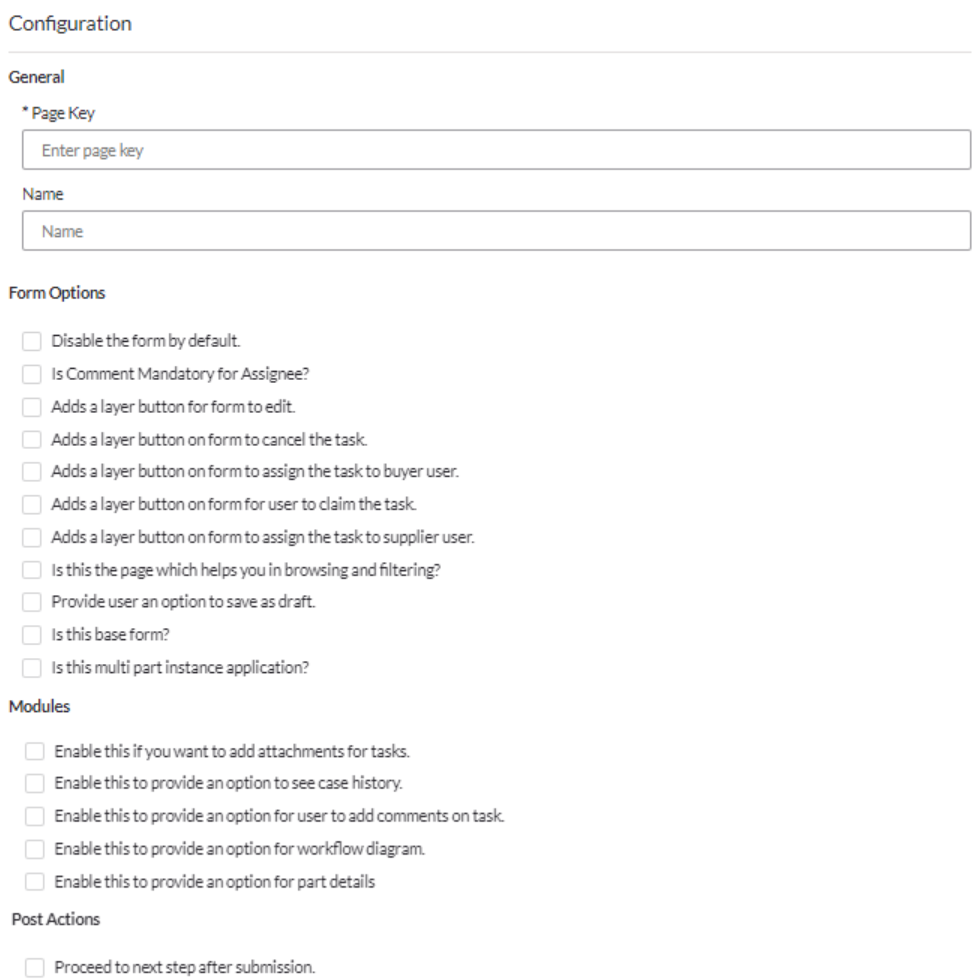
Your newly created tag will now be listed on the Tags page. Click on the kebab menu on an app to **Edit** or **Delete** the selected app.

Forms

You can also use the app builder to create custom forms. If you have downloaded apps from the market place, you can also customize forms from these apps to build your own application. In the Edit Application section, you can edit forms from this space. You can create, edit or delete forms for the apps other than the default apps provided in iENT applications.

To create a new form, in the Forms tab:

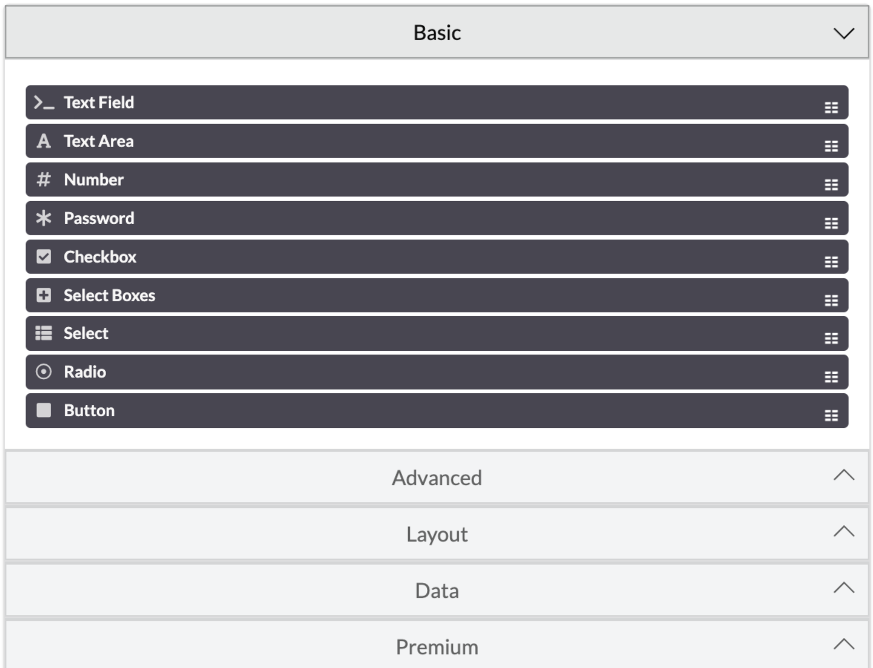
1. Click on the **+** button.
2. Enter all the **Configuration** information:



- **Page Key:** This should be unique to each form created.
- **Name:** Give your new form a name.
- **Form Options:** Select all your form options as required. For example, a base form is one that is used to create a task using the REST API. So if your new form is a base form, select the radio button under form options.
- **Modules:** Select all your module preferences as required.
- **Post Actions:** Select all your preferred actions as required.

3. **Design**
   iENT allows you to design forms easily by using a simple drag and drop facility. You can

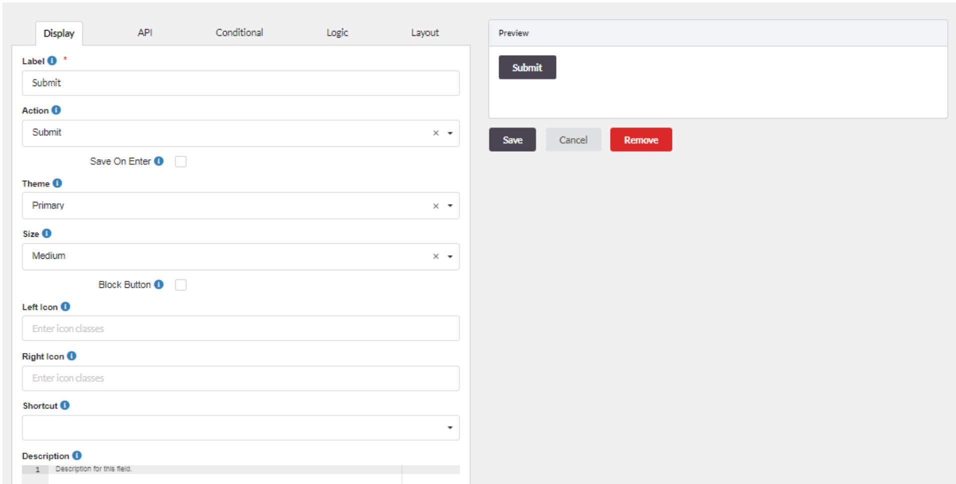
add:



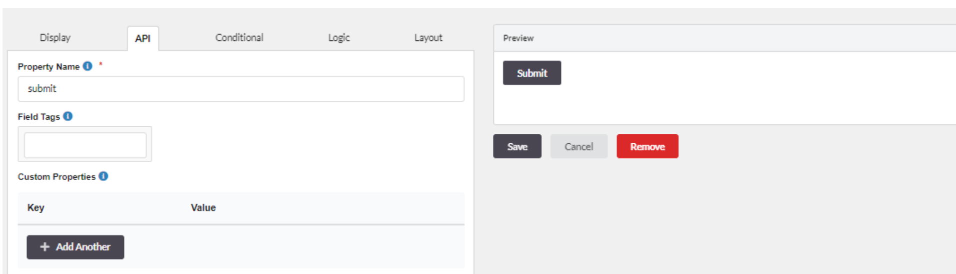
- **Basic** features to your form such as **Text Field**, **Number Field**, **Password**, **Checkbox**, **Button**, etc.
- **Advanced** features include Email, **Phone Number**, **Date**, **Time**, **Signature**, etc.
- **Layout** features such as **HTML Elements**, **Tables**, **Panels**, **Tabs**, etc.
- **Data** features such as **Containers**, **Data Maps**, **Trees**, etc.
- **Premium** features such as **reCAPTCHA**, **Files**, **Resources**, etc.

To use any of these features, drag and drop them to the boxed space on the right. This will open a pop-up to configure the new component that you're adding to the form.

Note: See form.io User Guide for more details.



Fill in details such as the **Label** under the **Display** tab, and the **Property Name** under the **API** tab.



Note: The property name is used to access the data of your created field. You can use the same API Property ID for common fields across forms for easier data flow.

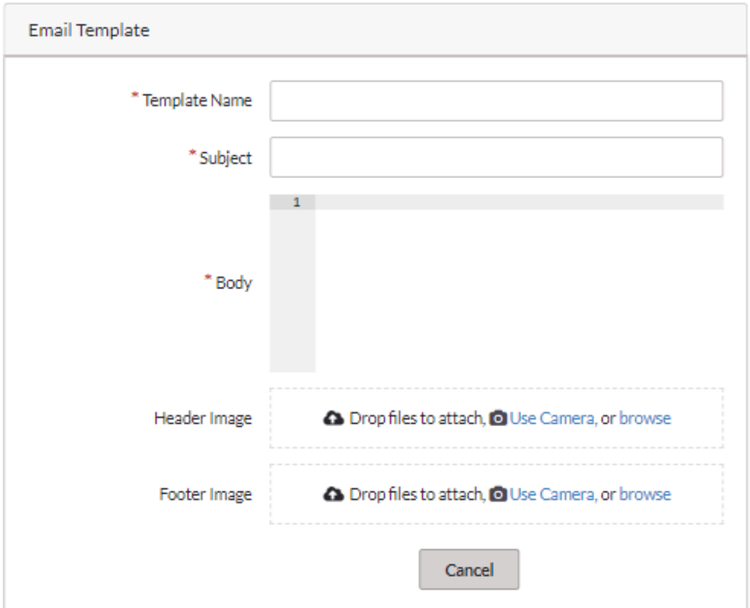
To **Edit** or **Delete** existing forms, from the forms section of your application, click on the kebab menu on your chosen form and select your action.

Email Templates

You can create, edit, or delete email templates for apps created by you. And only edit the email templates provided by default in iENT applications.

To create a new email template:

1. Click on the **+** button on the Email Templates tab.

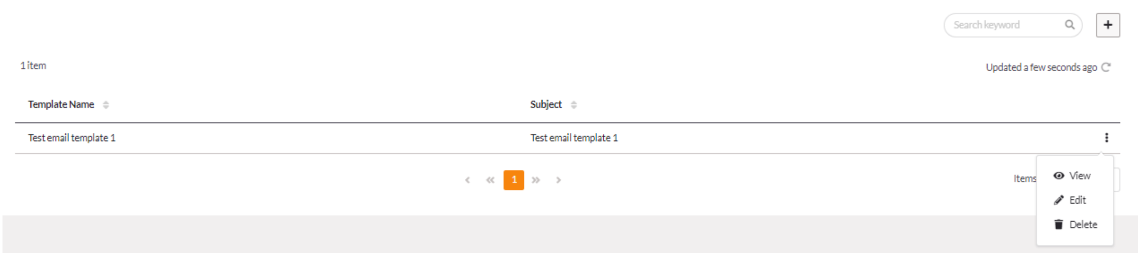


2. Update the following details of your template:
    a. **Template Name:** Give the new template a name.
    Note:This is a mandatory field.
    b. **Subject:** Add an email subject to your template
    Note:This is a mandatory field.
    c. **Body:** Add the body content to your email template. You can use **${}** to incorporate variables into the content (*Example: ${username}*).[1]
    Note:This is a mandatory field.
    d. **Header Image:** You can upload an image for your email's header.
    e. **Footer Image:** You can upload an image for your email's footer.
3. Click on **Submit.**

Note: *[1] List of standard variable names:*

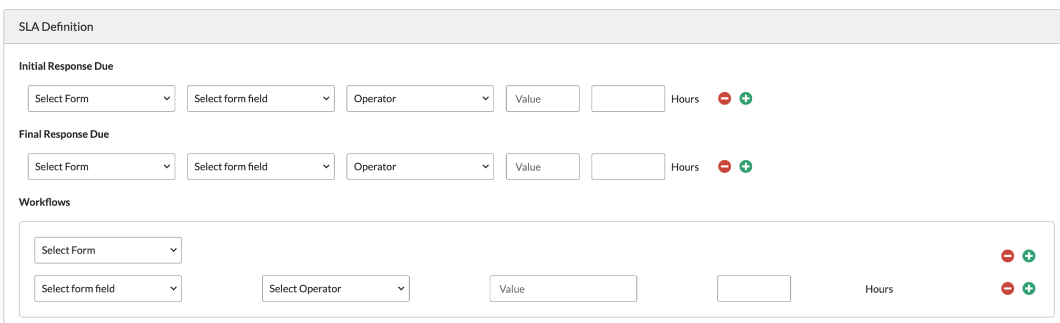
- *lastName*
- *firstName*
- *userName*
- *startDate*
- *endDate*
- *tenant*
- *ownerId*
- *partnerName*
- *TENANT_NAME*
- *problemCase*
- *partnerLocation*
- *shortDescription*
- *caseStatus*
- *assigneeId*

Once created, your new email template will be listed in the Email Templates section of your Application. To **View**, **Edit**, or **Delete** an existing email template, click on the kebab menu on your selected template and select your action.



SLA Definition

A service-level agreement (SLA) helps you define the expected level of service from a vendor by laying out the metrics via which the service is measured.



The following parameters can be set to define an SLA.

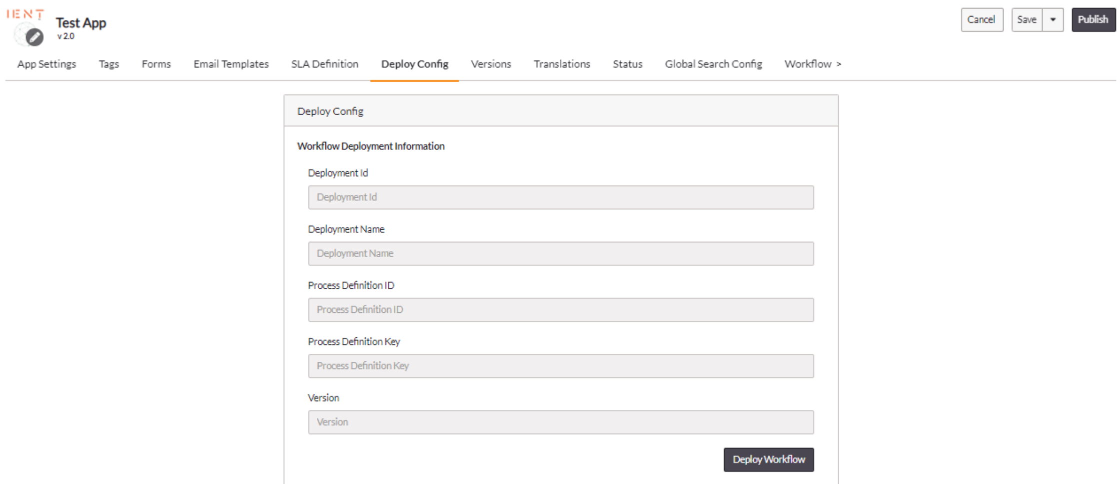
- **Initial Response Due:** This is the time taken by the Supplier to provide their initial response. These dues are calculated at an App record level (start to finish of the entire workflow).
- **Final Response Due:** This is the time taken by the Supplier to provide their final response. These dues are calculated at an App record level (start to finish of the entire workflow).
- **Workflows:** These dues are calculated for each workflow step (start to finish of a workflow task).

Deploy Config

iENT enables you to deploy a workflow to the server after which the application's users can create tasks pertaining to the app.

To deploy a workflow:

1. In the **Deploy Config** tab, click on the **Deploy Workflow** button.

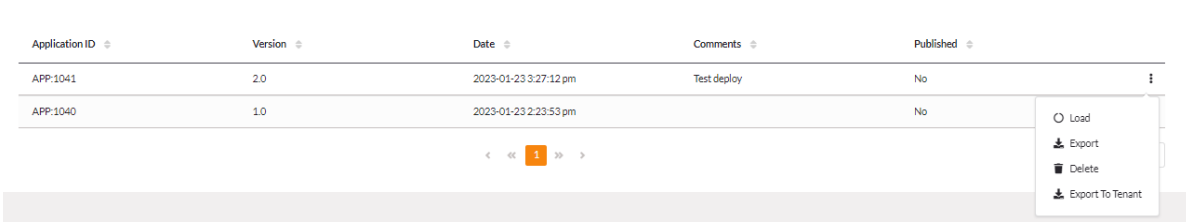


2. Once the workflow is successfully deployed all the fields on the page will be populated with the following information:
    - Deployment ID
    - Deployment Name
    - Process Definition ID
    - Process Definition Key
    - Version

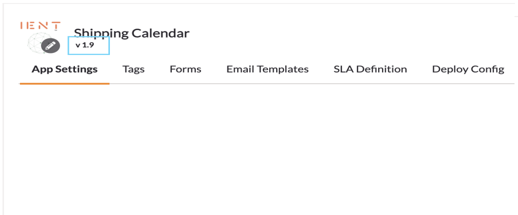
Note: *Once a workflow is deployed you will be able to modify the application by creating new versions.*

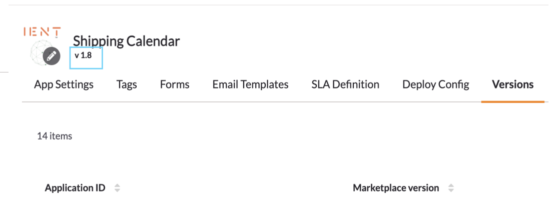
Versions

To check all the versions of your selected application (created by you or installed from the marketplace) you can navigate to the **Versions** tab of the app. Click on the kebab menu of a selected version to be able to perform the following actions:



- **Load:** When you *load* a selected version, the application will re-load with your selected version.





- **Export:** This downloads an encrypted rjson file[1] which can be used to publish or re-create the selected version of the application.
- **Delete:** This deletes the selected version of the application.
- **Export To Tenant:** This allows you to export the selected version of the application to a specific tenant.

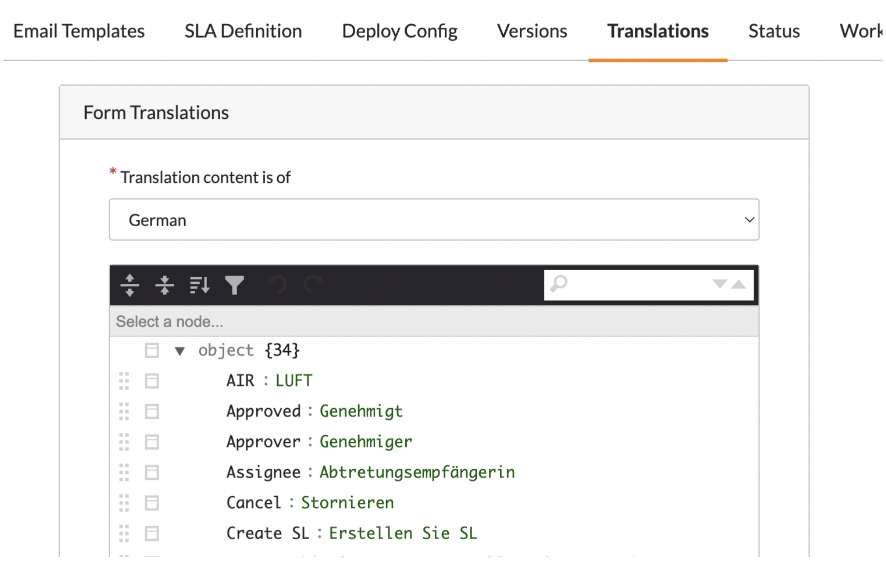
***Note**: [1]iENT Applications can be exported, so that the same application can be imported to other tenants. The exported application will be encrypted and can be saved locally in the form of rjson.*

Note: The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Translations

iENT enables you to provide translations of form labels to different languages. To provide translations:

1. In the Translations tab of your application, select your preferred language from the dropdown.
2. Make your translations of the form labels in the content box. The keys used in the form are created on form creation with empty values. You have to select the language and fill in the values with the translated text.



Note: By default, translations for the selected language are provided.

3. Click on Update Translations to save your changes.

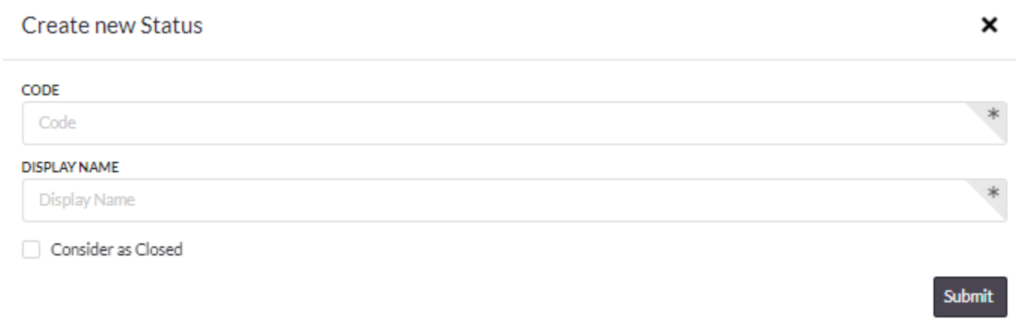
Status

The Status facility in the app builder is used to provide means to identify the state of a task form. The user can use this feature to identify pending tasks on their To-Do's page. Therefore, you can use this feature to filter out cases based on its status.

Note: *Each form in your application should have a status field in order to use the Status feature.*

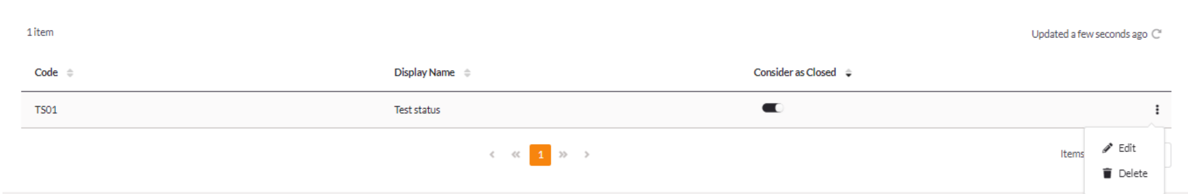
To create a new status:

1. Click on the **+** button in the Status tab of your application.
2. Enter the following information:



   - **Code**
   - **Display Name**
   - **Consider as Closed:** If selected, and the task is at this state, then it will be considered as *closed* and not be part of the active count in *My Apps.*
3. Click on **Submit** and then **Save** with version as required.

To **Edit**, or **Delete** an existing status, click on the kebab menu on your selected status and select your action.

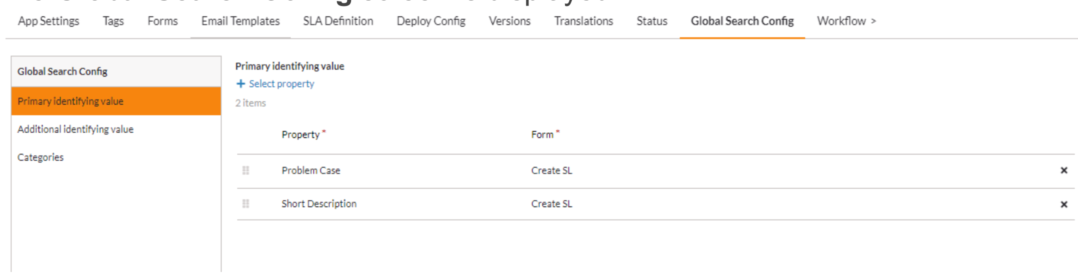


Global Search Configuration for App

The Buyer Admin has to maintain the global search configuration for each application (transactional data) so that these data reflects in the global search result.

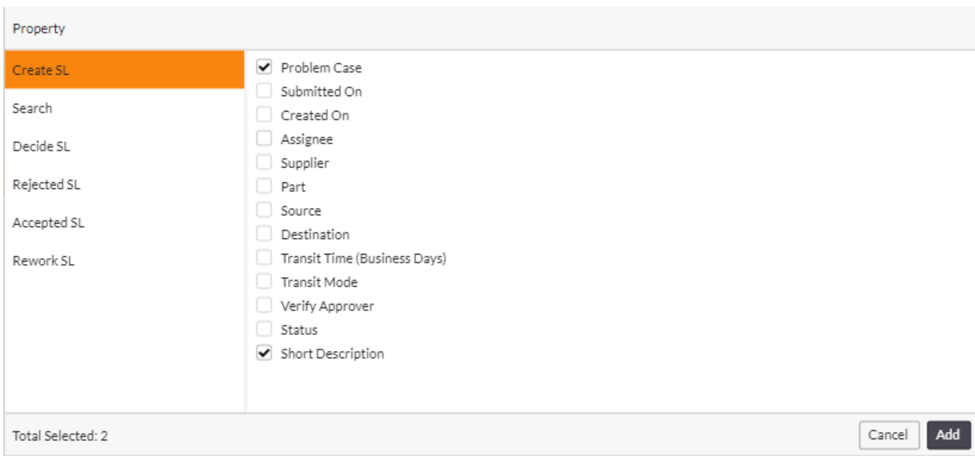
To configure the global search functionality for an application.

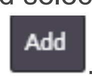
1. Click the **Global Search Config** tab on your application.
   The **Global Search Config** screen is displayed.



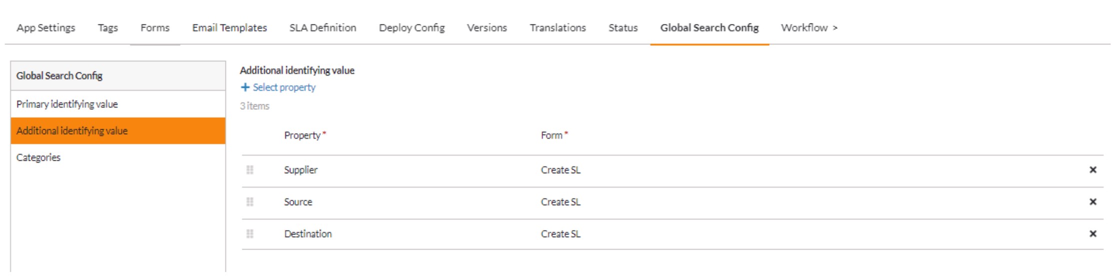
2. Click **Select property** link to select the properties as primary identifying values for the record and click 

.

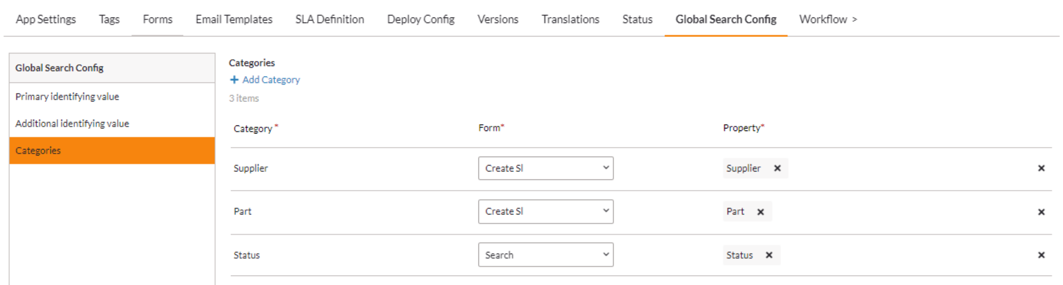


3. Click the properties from the left pane and select the required options as primary identifying values for the record and click 

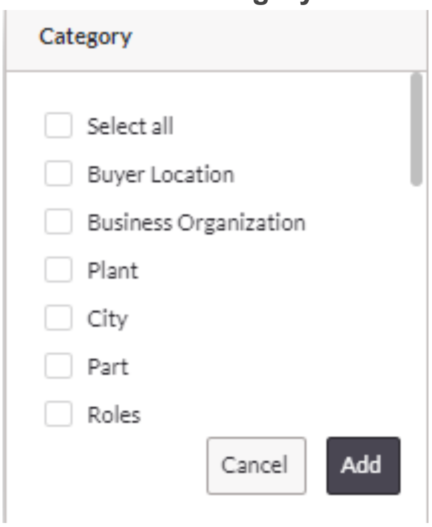
.
   Note: The property list displayed here as per the application being used. (Shipping Lanes app is used here as an example).
4. Similarly, add the additional identifying values by clicking the **Additional Identifying value** link in the left pane.

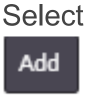
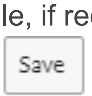


5. Click the **Categories** link on the left pane to add categories/facets to the record.



6. Click the **Add Category** link.



7. Select the options from the list you want to add as category for the record and click  (The Buyer Admin can create new categories in the **Global Search Categories** module, if required, and it will reflect in this Category list).
8. Click  to save the Global Search Config detail maintained.

See the Global Search Configuration for Modules section on how to configure the global search for modules.

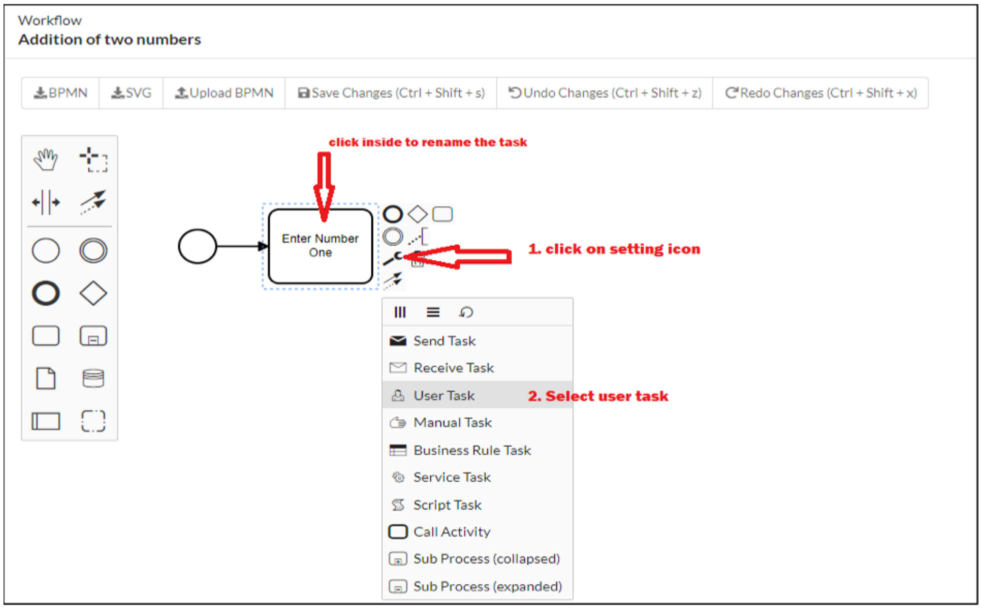
Note: When an app is published in the marketplace, it is available with its corresponding global search configuration.

Workflow

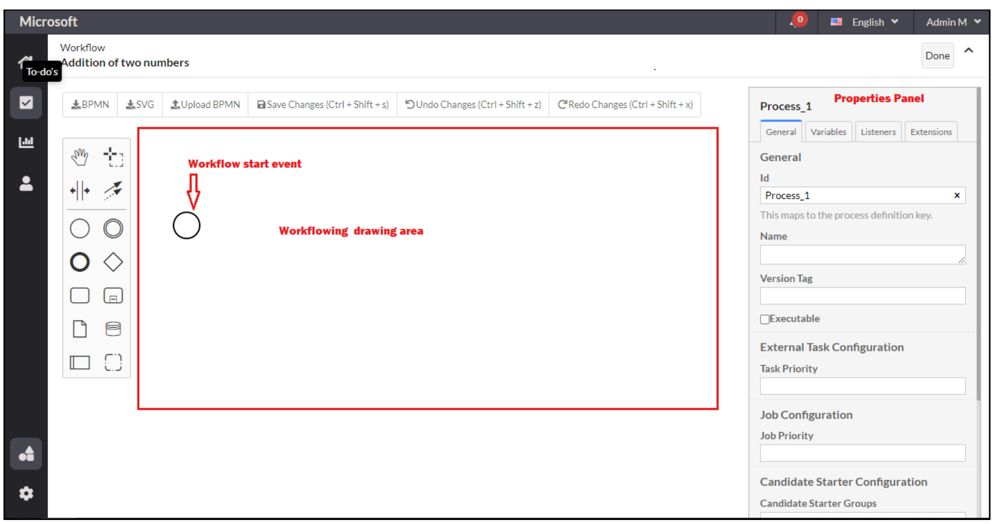
iENT allows you to create Business Process Modeling Notation (BPMN) workflow charts to help you depict end-to-end workflows visually. Using this feature, you will be able to visually analyze and orchestrate tasks for your application.

Note: See Camunda Platform Manual for more information.

To create a new BPMN chart, click on the **Workflow** tab in your Application. On the workflow screen, you can add a *start event*, *append tasks, name/rename tasks and events,* etc.



On the workflow screen, you will also be able to configure the properties of your tasks by using the **Properties panel.**



The workflow screen also provides the following actions for your new workflow:

- Download BPMN
- Download SVG
- Upload BMPN

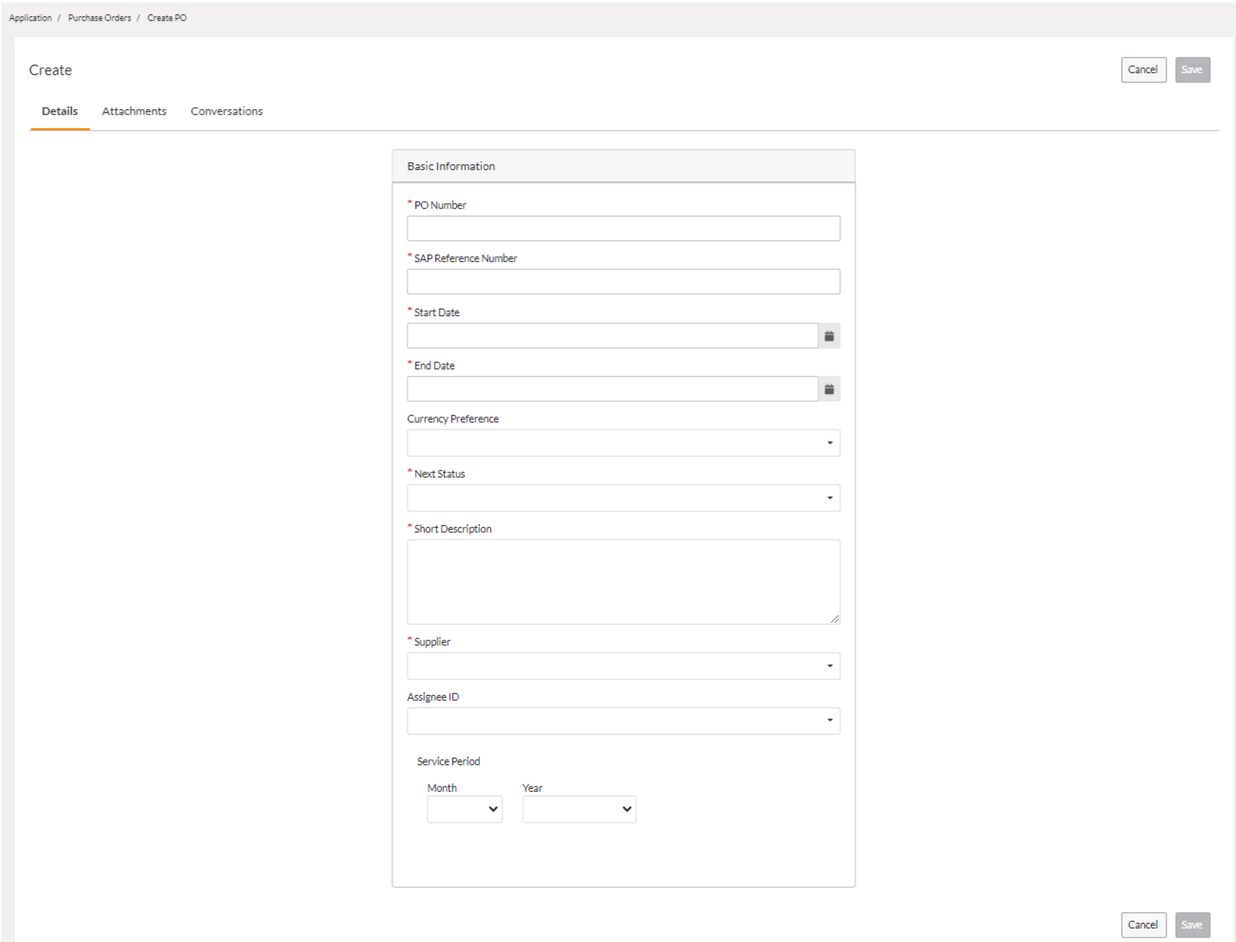
- Save Changes
- Undo
- Redo

Provide Attachment Option in Forms

The iENT application allows the Org Admin ability to provide additional way of attaching files to the records. In usual practice, a tenant can create a record and then attach files for the record in the **Attachment** tab associated with the record. Now an Org Admin can provide the option of attaching files directly in the forms while creating a record by any tenant. The files so uploaded will be available in the **Attachment** tab (for the record) along with tag name (if provided while uploading the file). The attachments can be filtered based on tag name and also all the attachments can be downloaded in a single ZIP file. The downloaded ZIP file will have the folders with the tag name containing the corresponding attachment.

Org Admin has to provide the attachment facility for all the apps individually where this direct file attachment is required.

Here form of **Purchase Order** app is used to show how the attachment option is provided. The following screen shows the form displayed when user tries to create new record in the **Purchase Order** app.

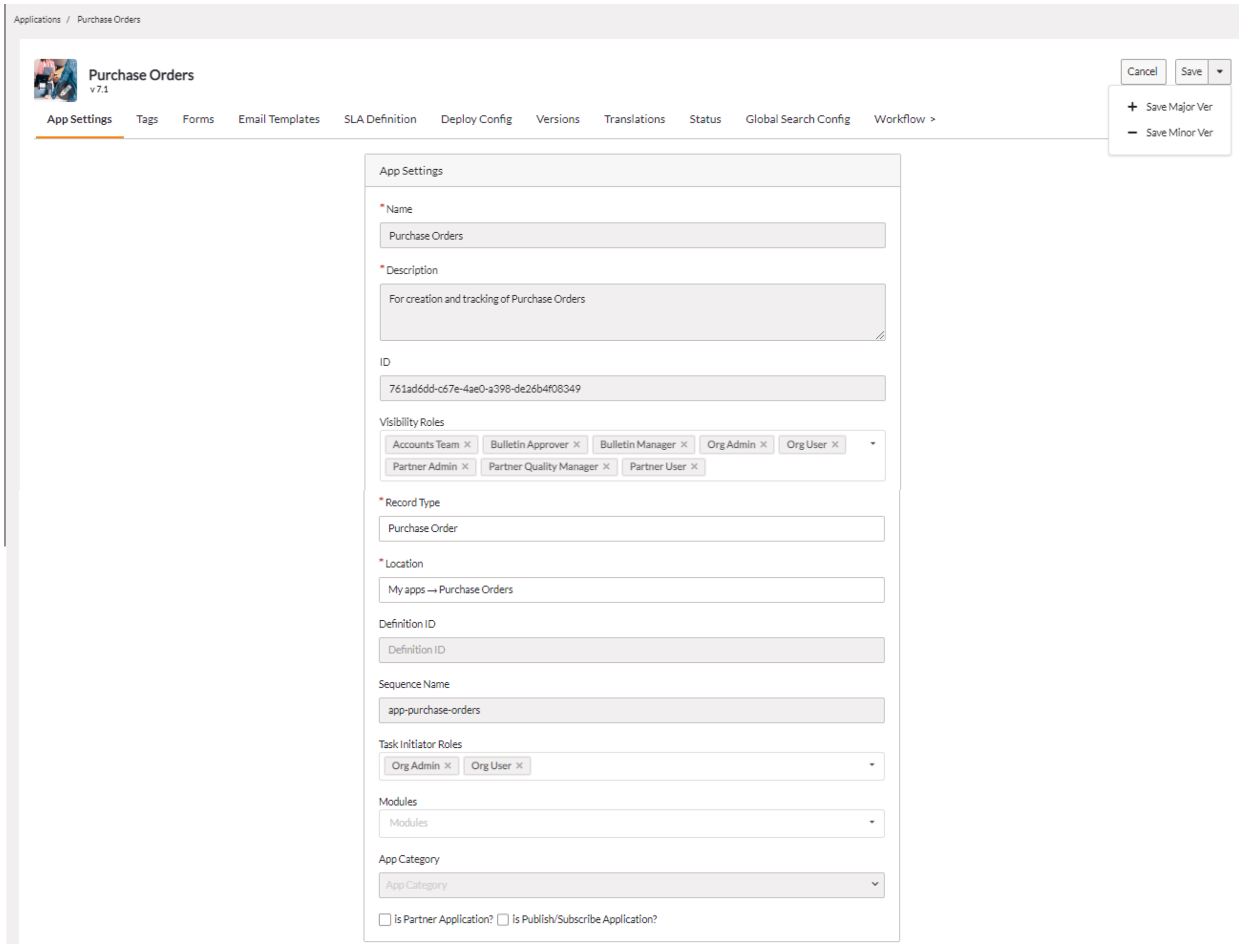


Note: The option to attach file directly in this screen is not there.

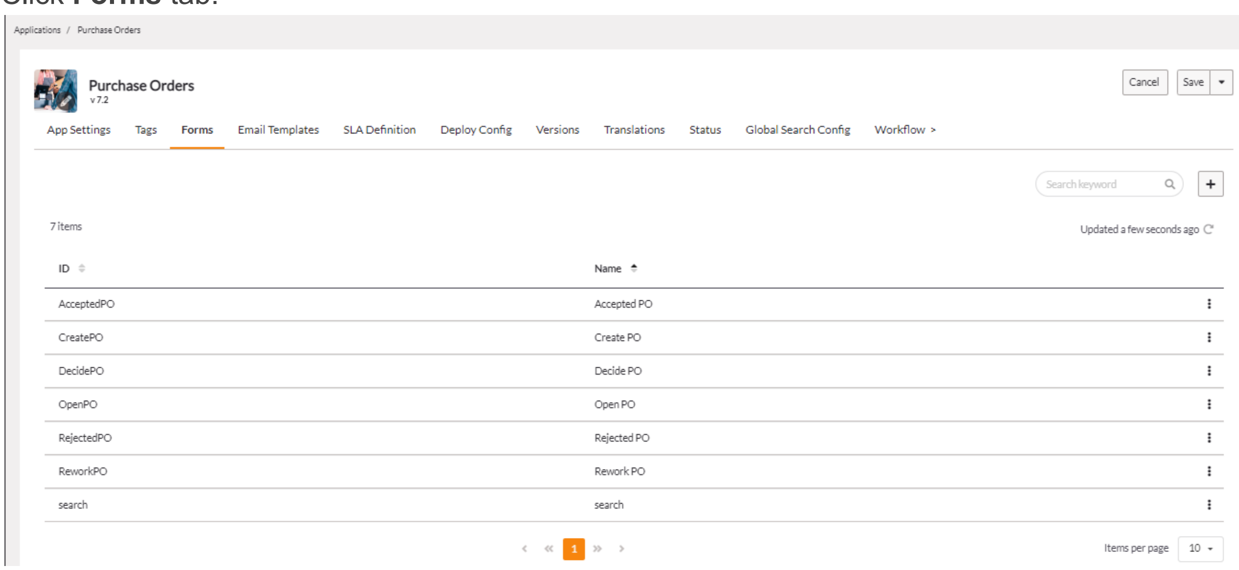
Here, the user has to first fill the details for the record and save it. Then the corresponding files can be attached in the **Attachment** tab.

To provide file attachment option directly in the form for an application:

1. Log in to the iENT Application.
2. On the navigation bar on the homepage, click **Project**.
3. Click the app (here **Purchase Order** app is used for documentation) for which you want to provide the file attachment option directly in the form.

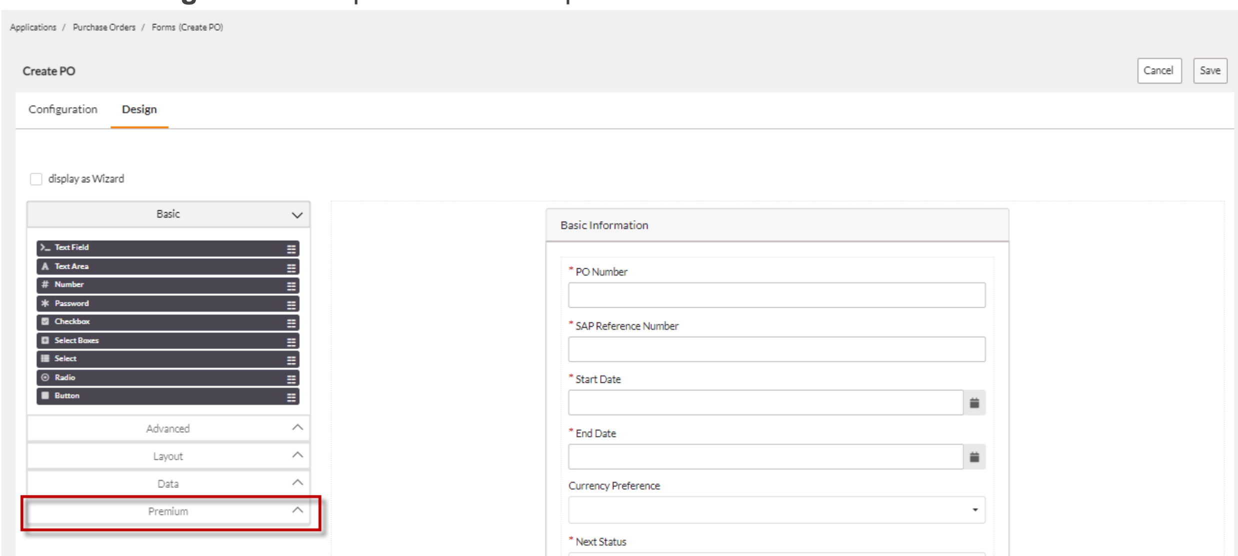


4. Click **Save Major Ver** or **Save Minor Ver** as required to enter the edit mode for the application.
5. Enter remarks for making the changes and click **Save Minor** or **Save Major** as per the version selected.
6. Click **Forms** tab.

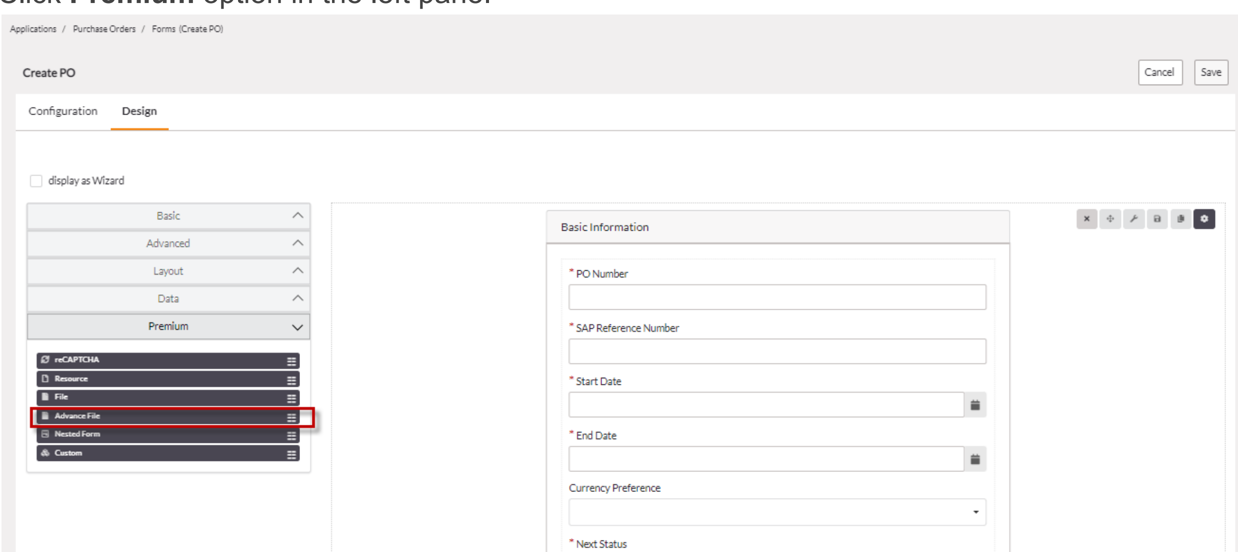


7. Click **Edit** option in the kebab menu (three dots) against any form except the **search** form.

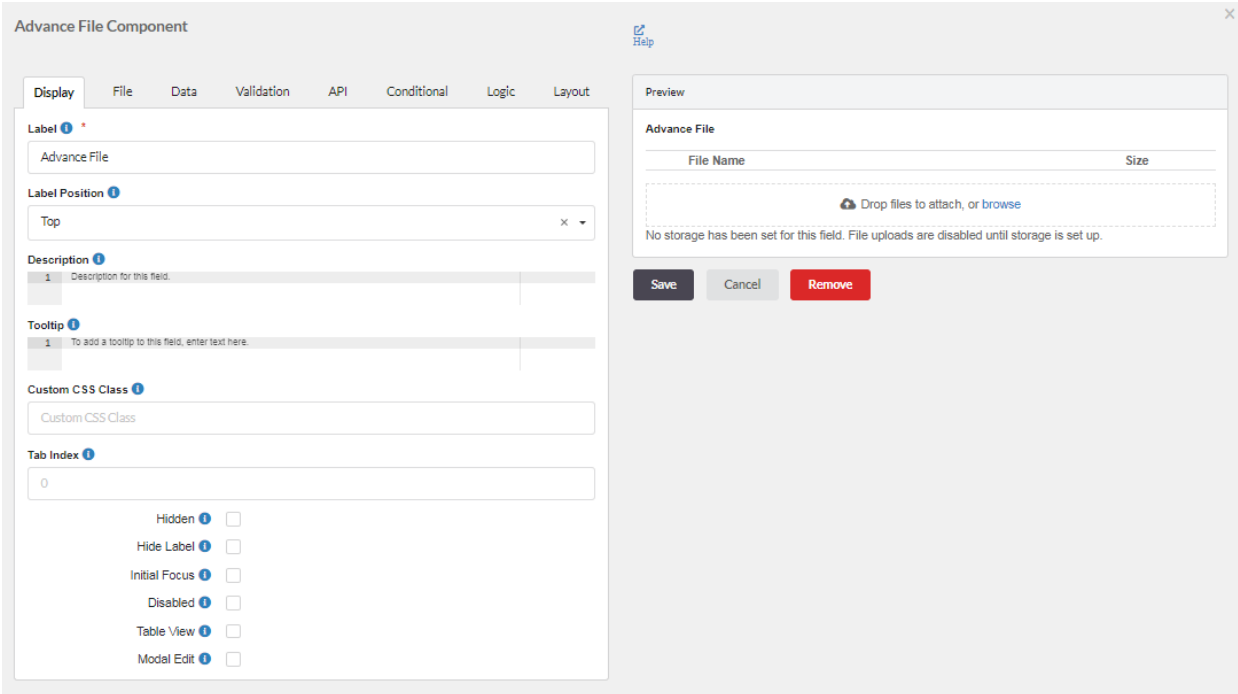
8. Click the **Design** tab in the particular form opened.



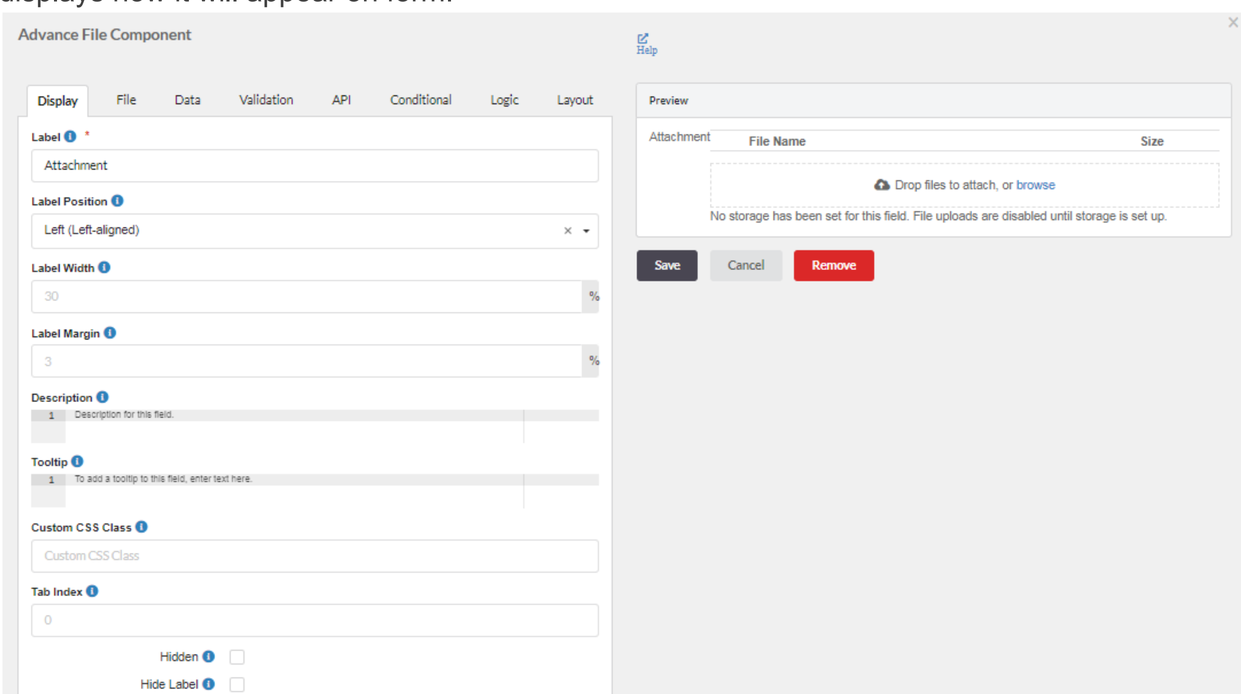
9. Click **Premium** option in the left pane.



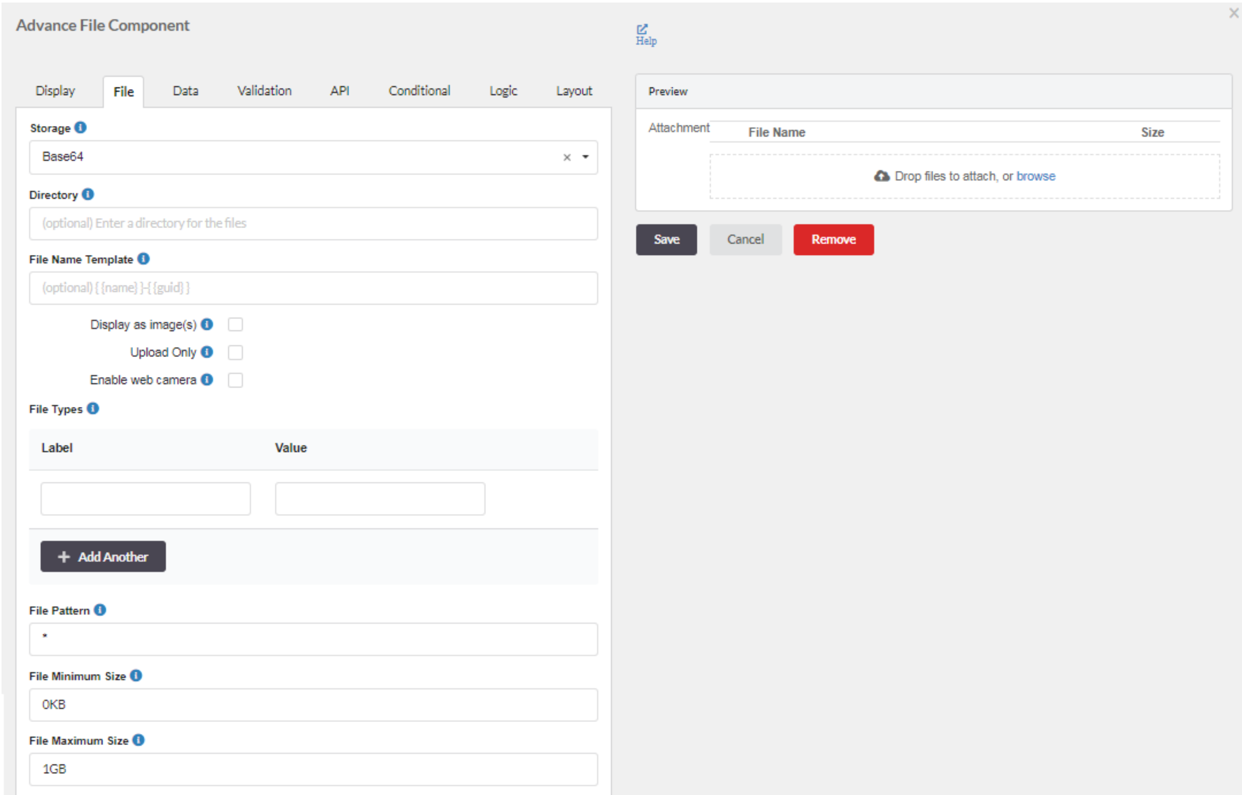
10. Drag and drop the **Advance File** component to the form.
    The **Advance File Component** screen is displayed.



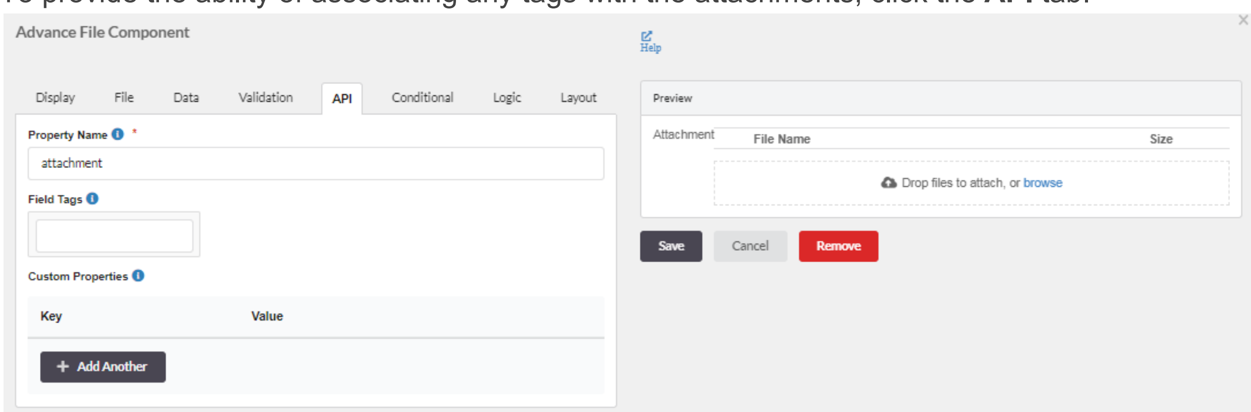
11. Enter the **Label** name to be displayed and select the **Label Position** from the dropdown list. (Here, **Attachment** is provided for **Label** field and **Left (left-aligned)** option is selected for **Label Position** field). The **Preview** section on the right side of the screen displays how it will appear on form.



12. Click the **File** tab and select the **Storage** option as **Base64** from the dropdown list.

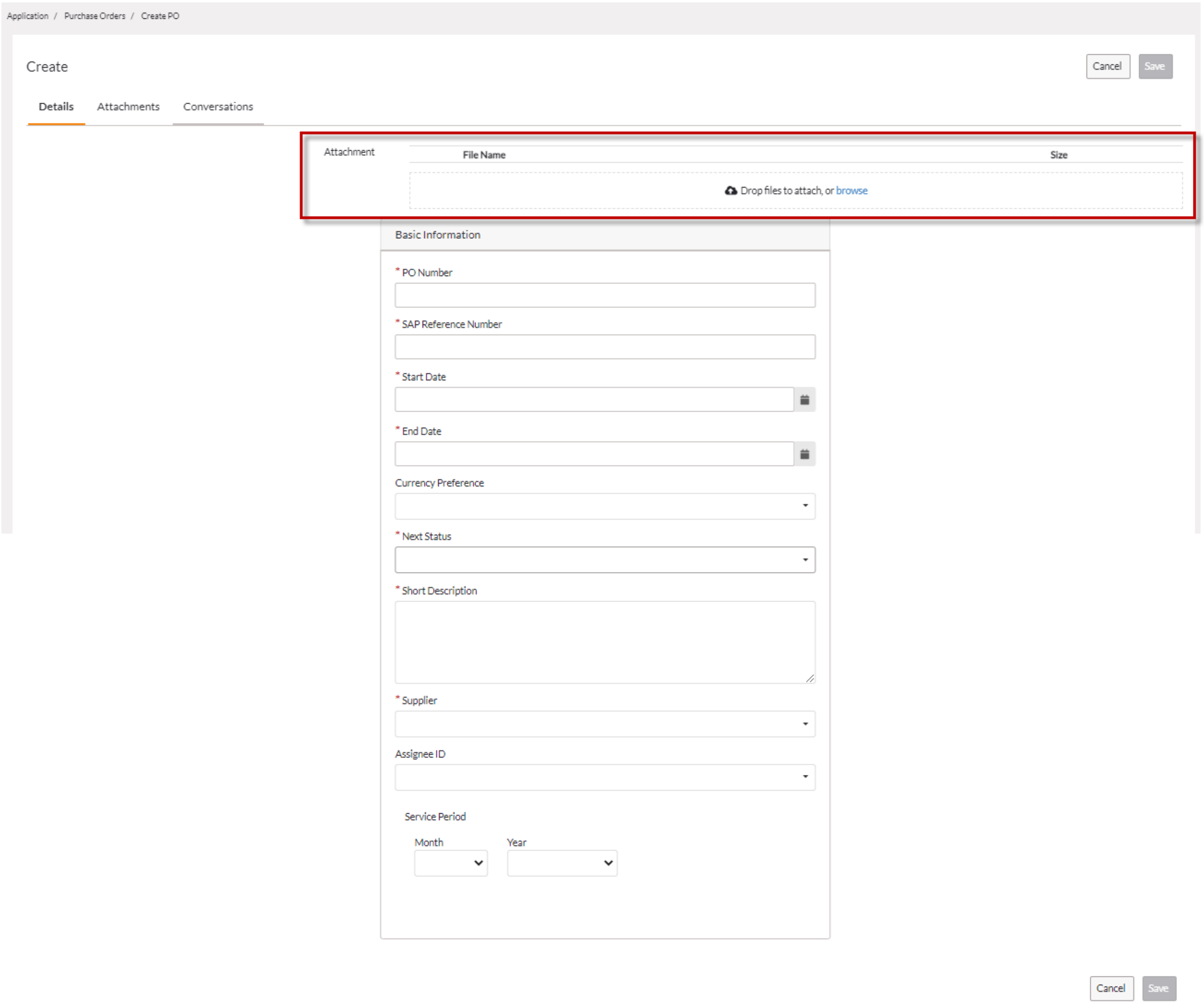


13. To provide the ability of associating any tags with the attachments, click the **API** tab.



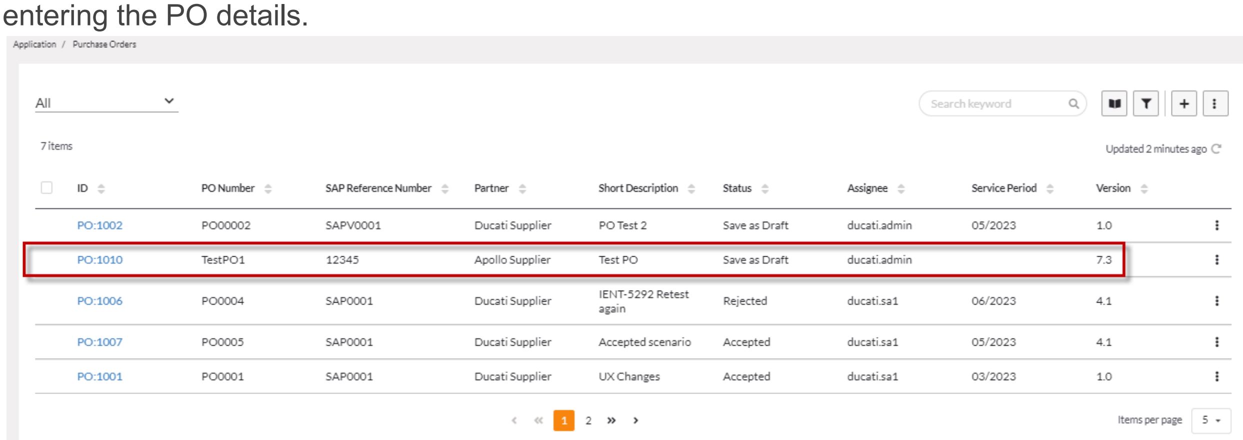
14. Click **Add Another** in **the Custom Properties** field and enter the following details:
    - **Key**: tag
    - **Value**: Internal or external.
15. Click **Save** to save the changes in the form.
16. Click **Save** to save the app changes.
17. Click **Deploy Config** tab.
18. Click **Deploy Workflow**.

The following screen displays the attachment option provided to the form for the **Purchase Order** app by following the preceding steps. Here the position of the attachment is shown at the top. Org Admin can set the position as required.

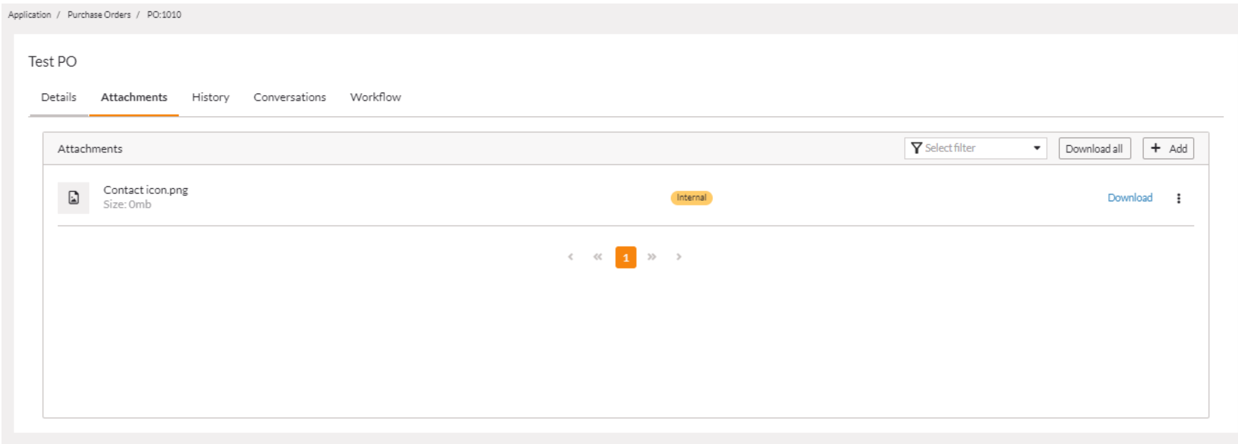


The file attached in this form while creating a record will be available in the **Attachment** tab once the record is saved.

Example:
Here, a test purchase order with PO Number TestPO1 is created and a file is attached while entering the PO details.



Accessing the PO record and clicking the **Attachment** tab.
It displays the file attached while creating the record.



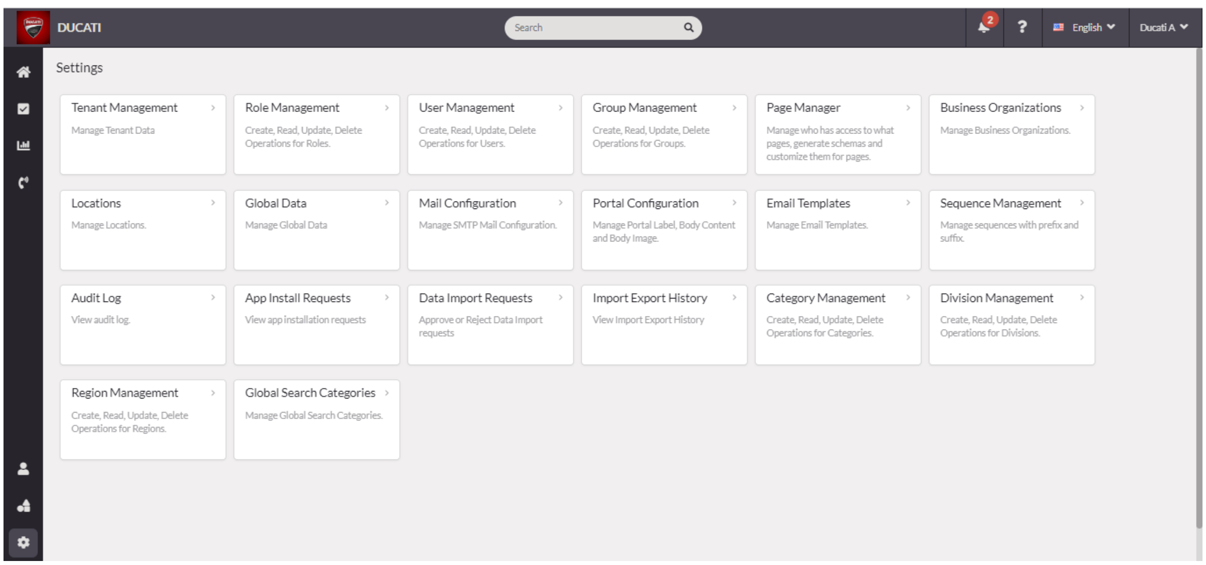
The file attached while creating the purchase order record is displayed along with the tag.
The filter option allows you to filter the attachments based on tags.
The **Download all** option downloads all the attachments in single ZIP file with tag name as folder name containing the corresponding file.

Global Search Categories

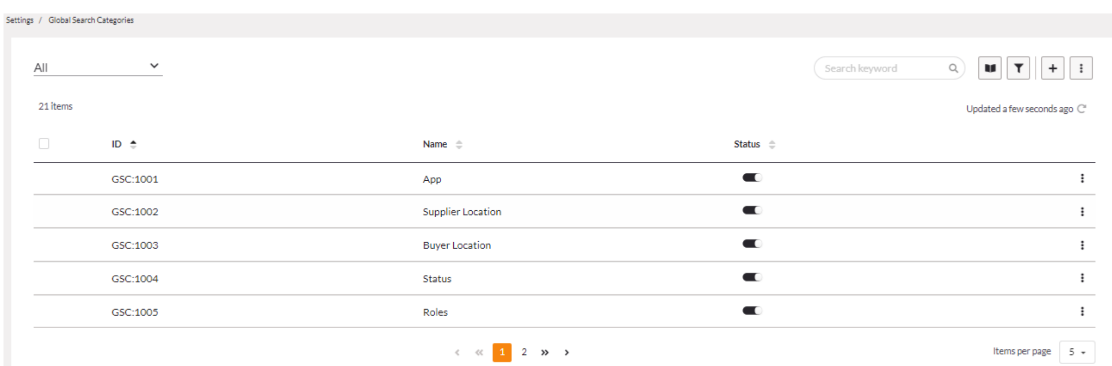
As a Buyer Admin you can create categories for records and data which can be used during categories updation when setting up global search configuration for any app or module. You can create new categories, view and update existing ones, delete categories, and download or export categories to another tenant within your organization. When a tenant is created in iENT application 19 categories are created by default for ready use.

To perform these operations:

1. Log in to the iENT Application.
2. Go to **Settings > Global Search Categories**.

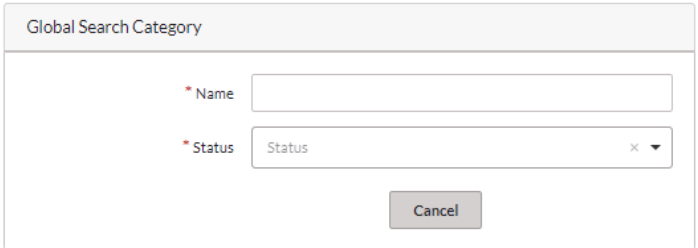


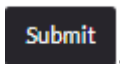
You will be able to view all your existing categories.



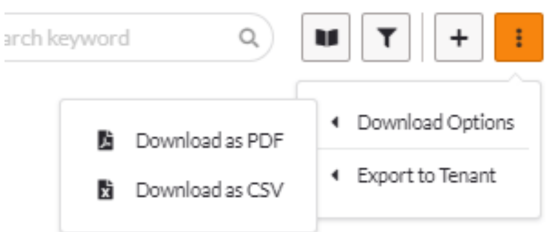
See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. To add a category, click on the **+ button** on the top right corner, and add the following mandatory details:

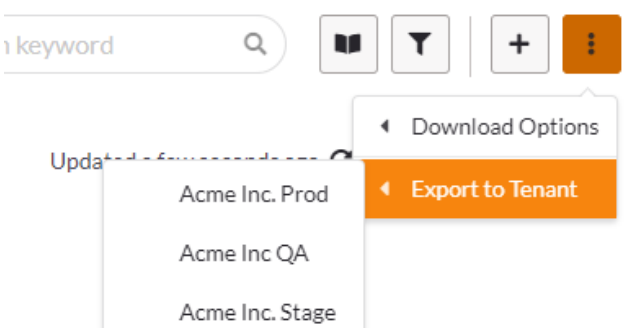


   - **Name**
   - **Status**
4. Click 

.
5. To download a list of categories, select the categories (use **Select All** check box to select all available categories) and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



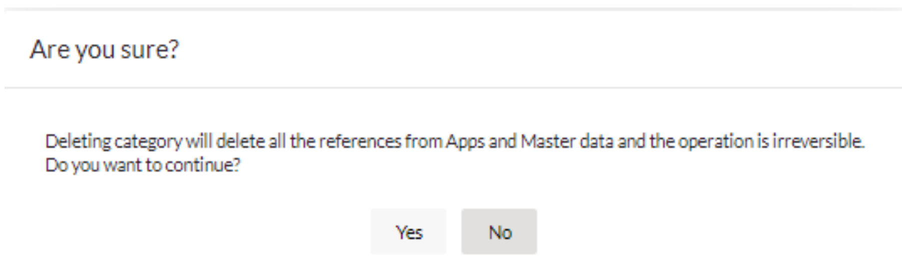
   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.
6. To export global search categories to a specific tenant, select the categories and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.



The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

7. To delete an existing category, select the particular category and then click on the kebab menu icon of the particular category and select **Delete**.

Confirm deletion by clicking on **Yes**.



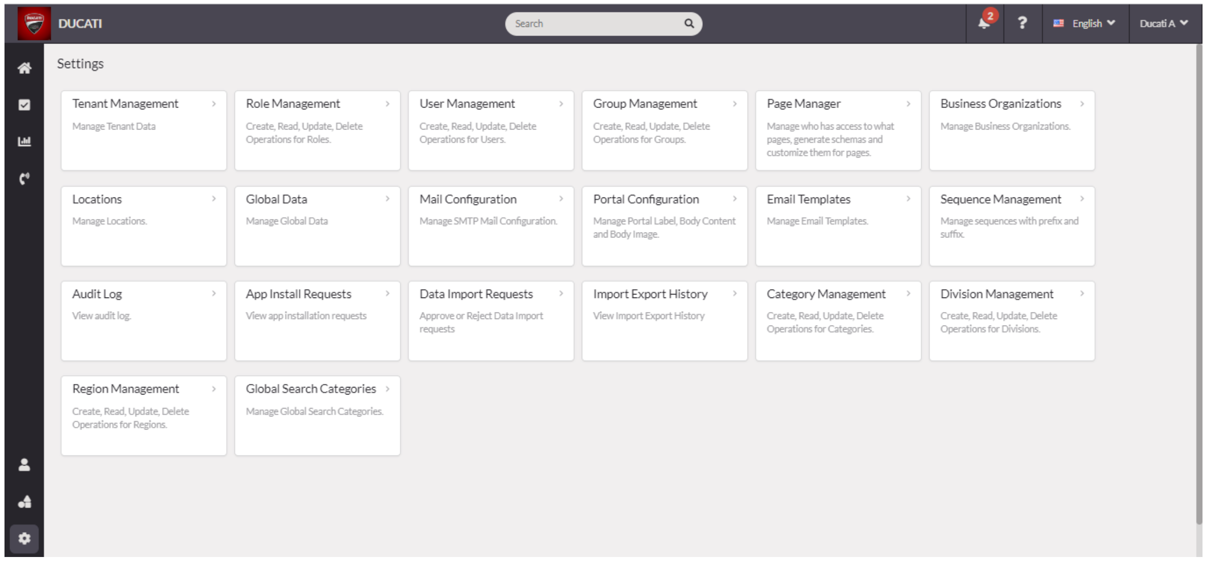
Note: Deleting a global search category deletes all its references from all the applications and master data.

Translation of Global Search Category Terms

All global search category IDs have the fields *name* and *status*. By default, translations in other languages are provided for these fields. As a Buyer Admin you can make changes to the existing translation or provide new translation when you have created a new global search category.

To modify the translation:

1. Log in to the iENT Application.
2. Go to **Settings > Global Search Categories**.

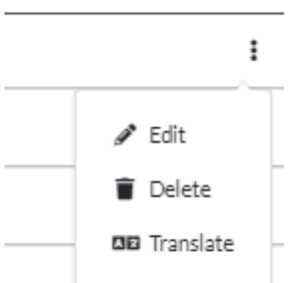


You will be able to view all your existing categories.

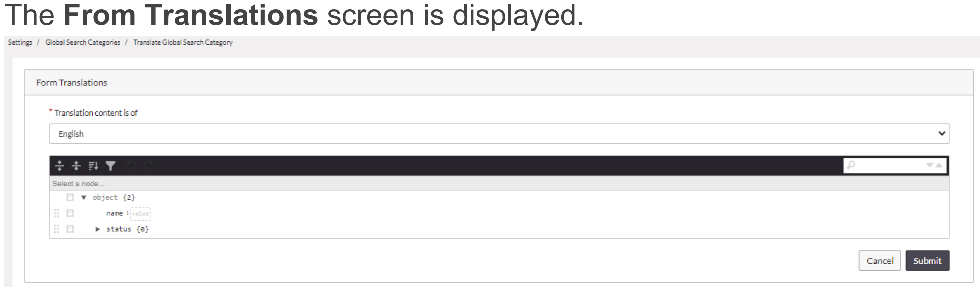
ID	Name	Status
CTG:1001	Software	
CTG:1002	Hardware	
CTG:1003	Administration	

See *here* to explore how you can search, view, sort, and filter all the displayed records.

8. To translate an existing category, click on the kebab menu icon of the particular category and select **Translate**.



The **From Translations** screen is displayed.



3. Select the language from the drop-down list of **Translation content is of** field.
4. Update or enter the required translation and click .

Translation updated successfully message is displayed.

Global Search Configuration for Modules

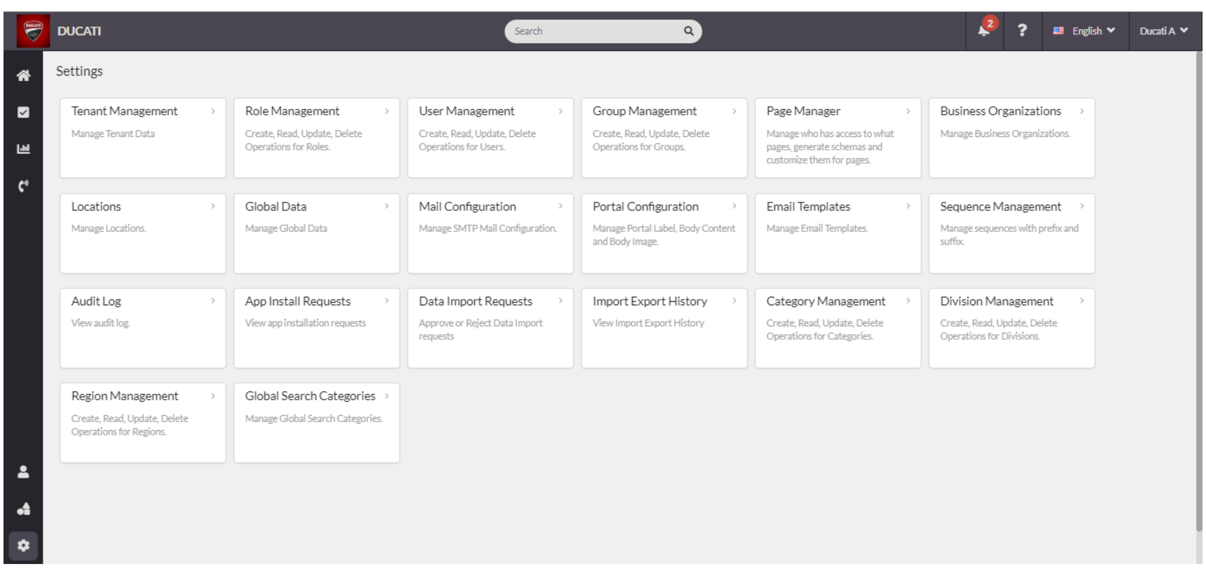
As the Org Admin (Buyer Administrator), you will be able to set global search configuration for the following modules.

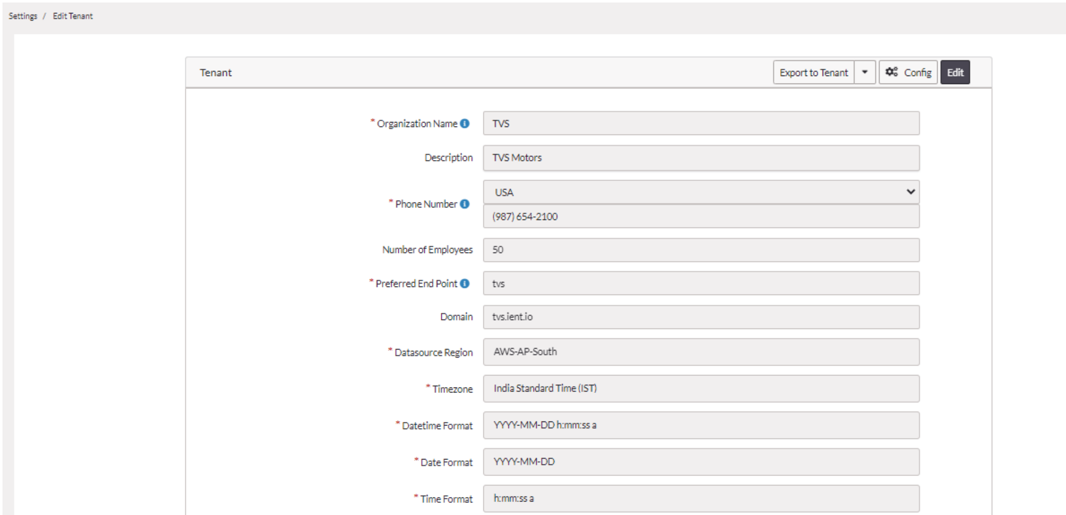
- Tenant Management
- Role Management
- User Management
- Business Organizations
- Locations
- Portal Configuration
- Email Templates
- Global Data(all modules)
- Category Management
- Region Management
- Division Management

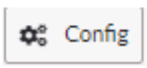
Note: As an Org Admin (Buyer Admin), when you perform a global search, the search results will fetch data from the all the modules listed above and the applications. The search will only display the records or data for which the Buyer Admin is authorized to view/access.

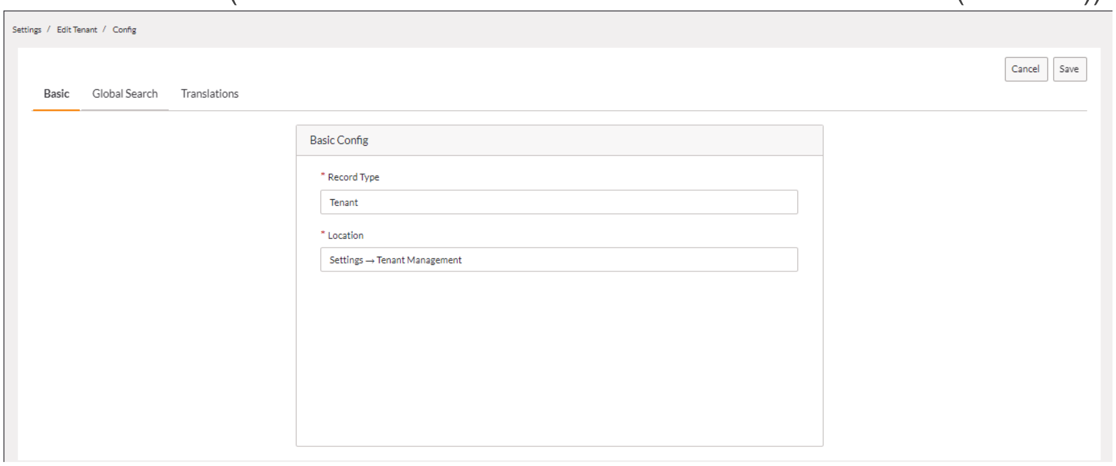
To set the global search configuration for a module (Here, it is explained using the **Tenant Management** module as an example)

1. Log in to the iENT Application.
2. Go to **Settings > Tenant Management**.

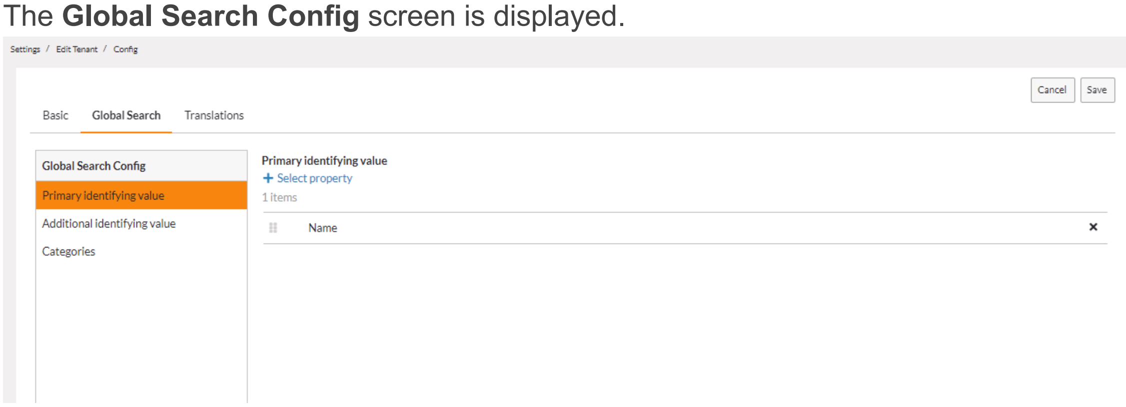




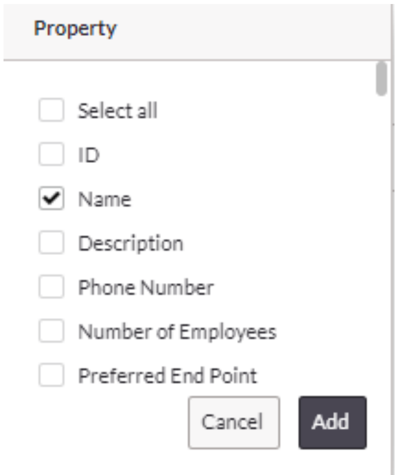
3. Click  (In some modules it will be available in the kebab menu (three-dot)).



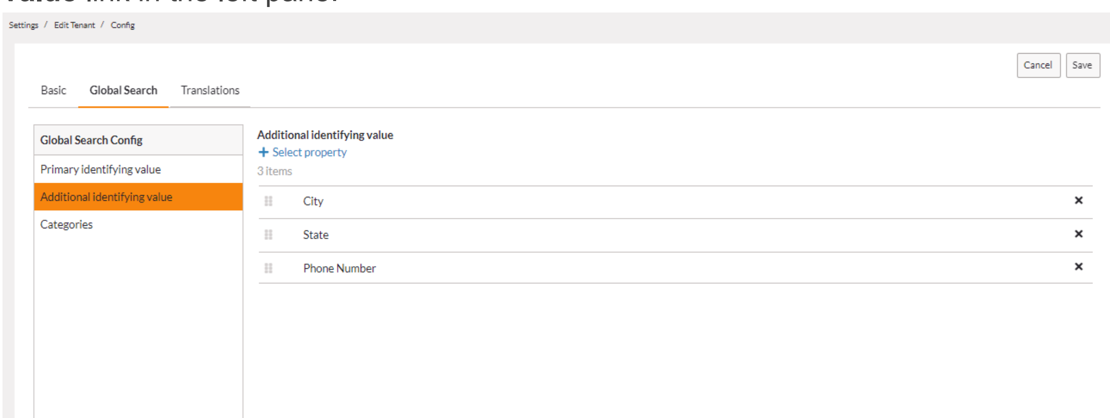
4. In the **Basic Config** screen you can modify the **Record Type** and **Location** of the record, if required. These fields are pre-configured by default for all the modules when new tenants are created in iENT.
5. Click **Global Search** tab.
   The **Global Search Config** screen is displayed.



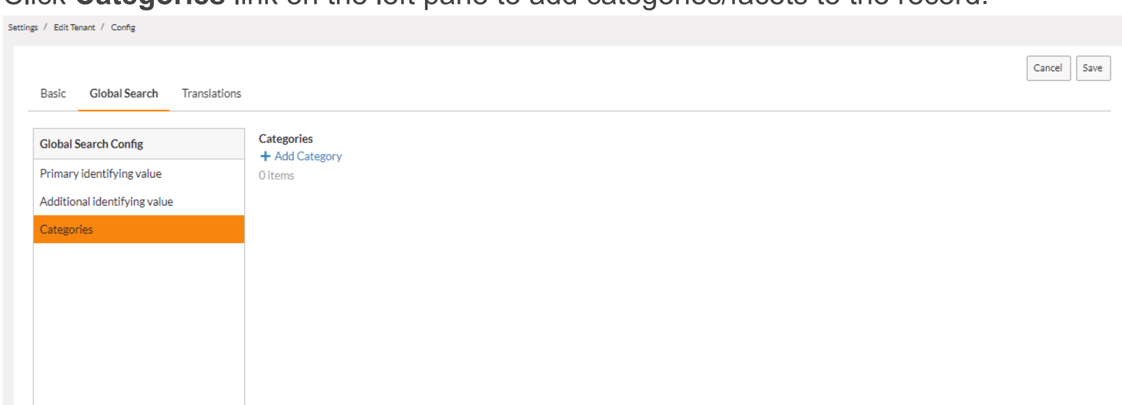
6. Click **Select property** link to select the properties as primary identifying values for the record and click .



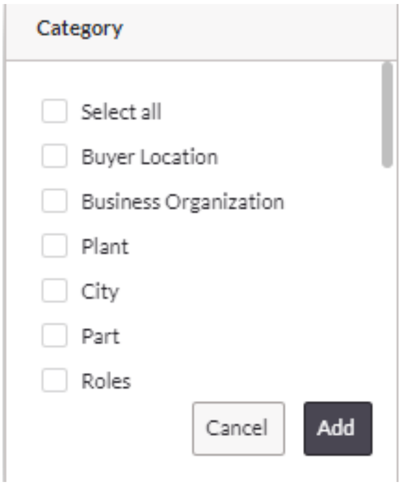
7. Similarly, add the additional identifying values by clicking the **Additional Identifying value** link in the left pane.

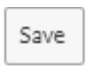


8. Click **Categories** link on the left pane to add categories/facets to the record.



9. Click the **Add Category** link.

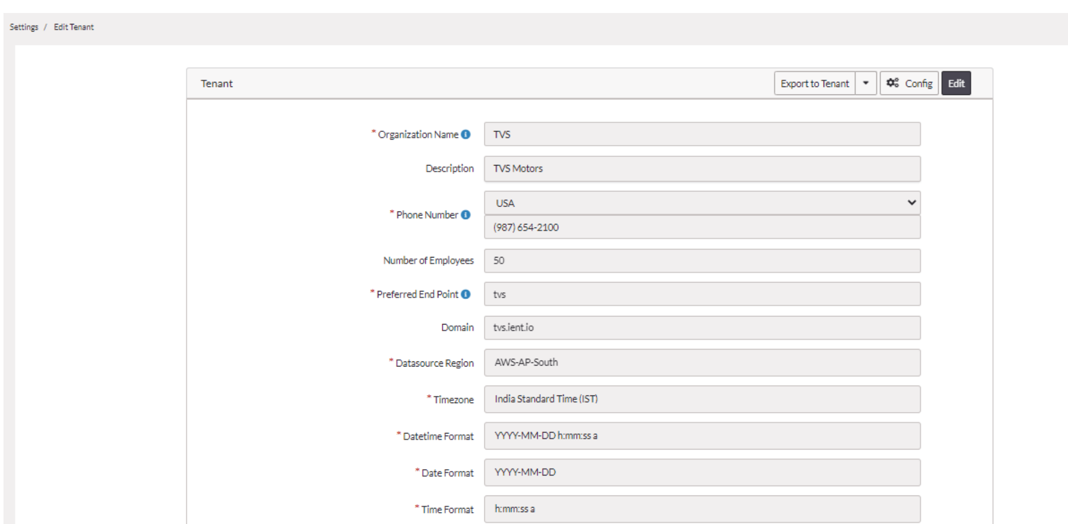


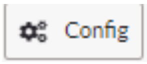
10. Select the options from the list you want to add as category for the record and click  (The Org Admin can create new categories in the **Global Search Categories** module, if required, and it will reflect in this Category list).
11. Click  .
    The *Global search config saved* successfully message is displayed.

Translation in Global Search Configuration

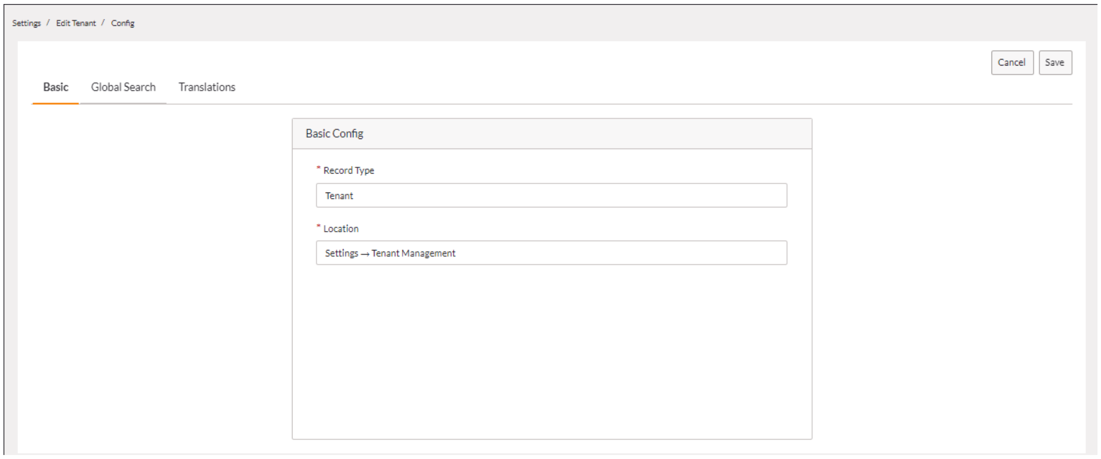
iENT enables you to display the field labels provided in the **Basic Config** screen of the global search functionality in other language.
To provide translation (Here, it is explained using the **Tenant Management** module as an example)

1. Log in to the iENT Application.
2. Go to **Settings > Tenant Management**.

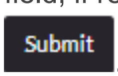


3. Click 

(In some modules it will be available in the kebab menu (three-dot)).



4. Click **Translations**.

5. From the drop-down list in the **Translation content is of** field, select the language that you want to use.
6. Modify the corresponding translation for the field labels in the text box provided against each field, if required (the translation is provided by default).
7. Click 

.
   Translations updated successfully message is displayed.

Global Data

As the Org Admin (Buyer Administrator), you will be able to set global data (settings) for all applications of your organization on the iENT portal. The following nine Global Data modules can be configured:

- **Problem Qualifiers**
- **Customers**
- **Problem Types**
- **Commodity Groups**
- **Reject Reasons**
- **Parts**
- **Production Phases**
- **Disruption Status**
- **Partners**

The Partners module is provided to your organization by default when your organization is onboarded to the iENT application. The other eight modules will be available if they are provided during your organization's onboarding process. Org Admin will be able to hide/unhide the modules (except the Partners module) provided to an organization during its onboarding. Also Org Admin will be able to create new modules based on business requirement.

This section describes how to:

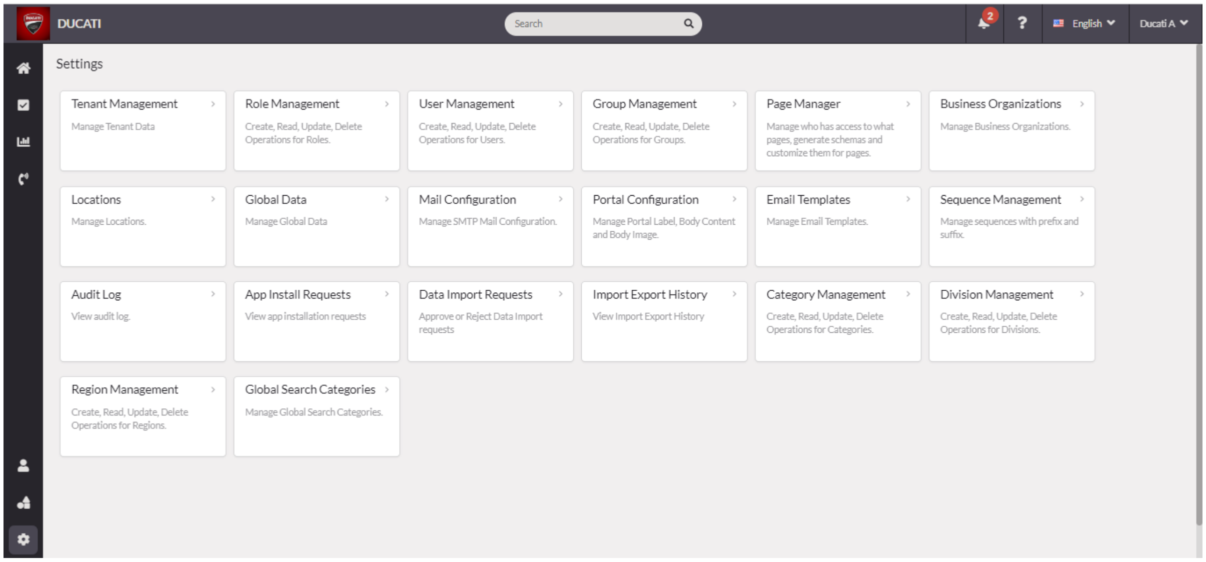
- Configure the modules at global level like hide/unhide them, check their status, and create new modules or sub-modules to an existing module, and rearrange the sub-modules.
- Configure the available modules at individual level.

Global Data Modules Configuration

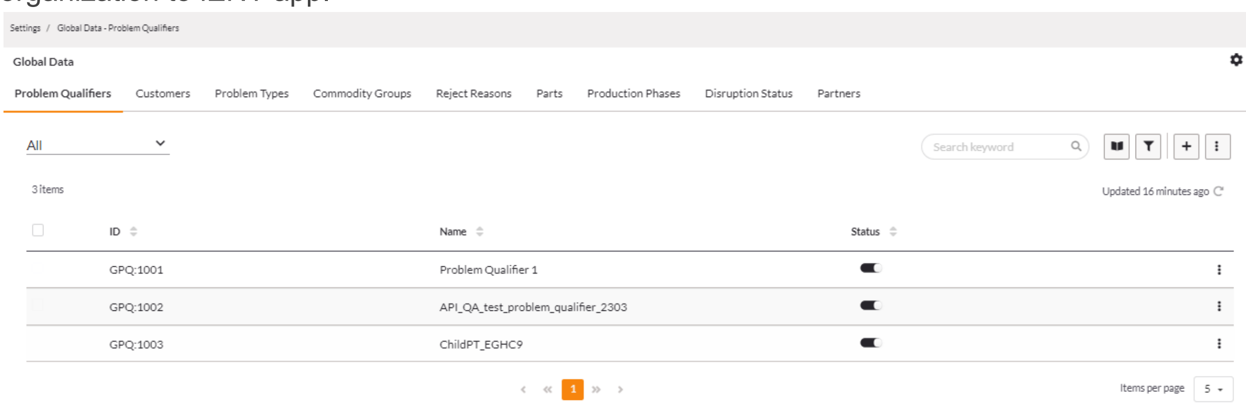
To view the existing configuring of the available Global Data modules:

1. Log in to the iENT Application.

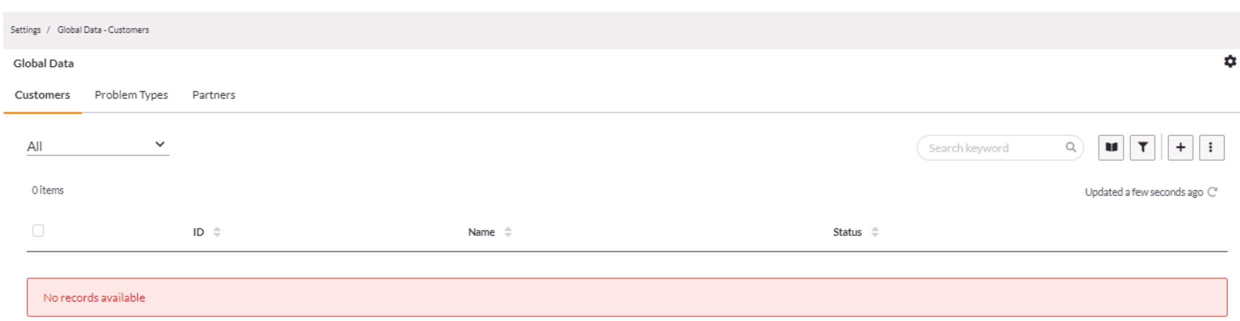
2. Go to **Settings > Global Data**.



You will be able to view all your existing modules as provided during onboarding of your organization to iENT app.



Global Data Modules (all nine modules)

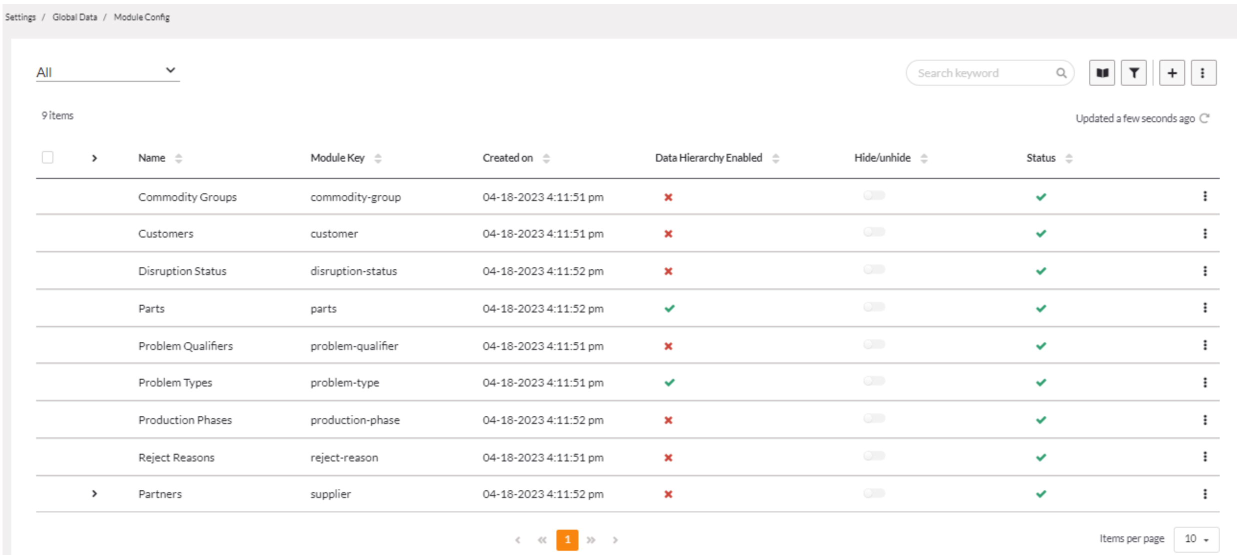


Global Data Modules (only three modules)

Note: This screen will display the Global Data modules as provided to an organization during its onboarding to iENT app. Additional modules created by Org Admin will also

reflect here. The above two screens are provided as examples to show the availability of the Global Data modules for an organization as part of documentation.
See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. Click (**Module Config**) on the top right corner.
   The **Module Config** screen is displayed.



Settings / Global Data / Module Config

All

9 items

Updated a few seconds ago

Name	Module Key	Created on	Data Hierarchy Enabled	Hide/unhide	Status
Commodity Groups	commodity-group	04-18-2023 4:11:51 pm	✖		✔
Customers	customer	04-18-2023 4:11:51 pm	✖		✔
Disruption Status	disruption-status	04-18-2023 4:11:52 pm	✖		✔
Parts	parts	04-18-2023 4:11:52 pm	✔		✔
Problem Qualifiers	problem-qualifier	04-18-2023 4:11:51 pm	✖		✔
Problem Types	problem-type	04-18-2023 4:11:51 pm	✔		✔
Production Phases	production-phase	04-18-2023 4:11:52 pm	✖		✔
Reject Reasons	reject-reason	04-18-2023 4:11:51 pm	✖		✔
Partners	supplier	04-18-2023 4:11:52 pm	✖		✔

Items per page 10

See *here* to explore how you can search, view, sort, and filter all the displayed records.

4. The following information is displayed:
   - **Name**: Displays the names of the module. This column displays all the modules opted by the organization and the ones created by Org Admin.
   - **Module Key**: Displays the corresponding key for the Global Data module.
   - **Created On**: Displays the date when the Global Data module was created.
   - **Data Hierarchy Enabled**: Displays if a record in a module can have child-record as in parent-child relationship.
   - **Hide/unhide**: Shows the status of the Global Data module as hidden or unhidden to the users. When it is hidden, the module data will be unavailable across all the apps.
   - **Status**: Displays green check mark if a module is working fine or red cross mark if the mandatory config is missing.
5. Click **>** beside a module name to view the sub-modules associated with it.

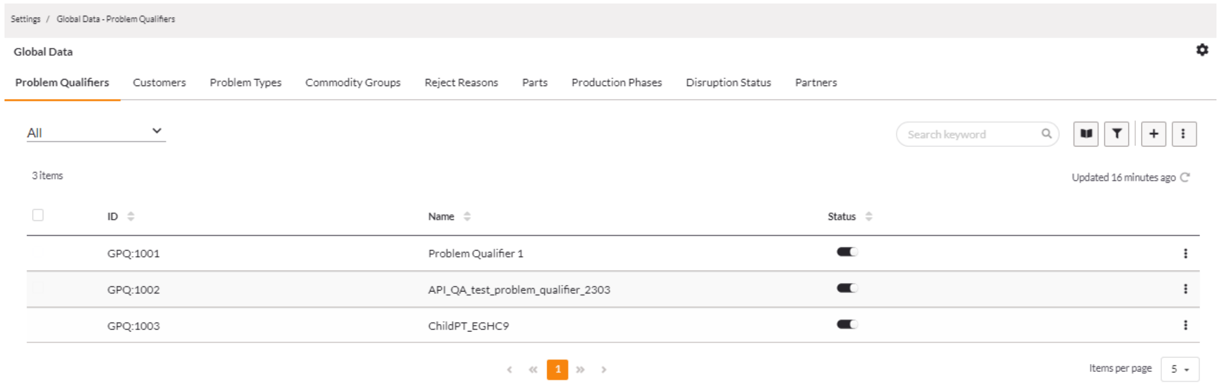
Hide/Unhide Global Data Modules

When an Org Admin hides a global data module, the module's data will be unavailable across all the apps. Upon unhiding the module, the data becomes available across all the apps.

To hide/unhide a global data module:

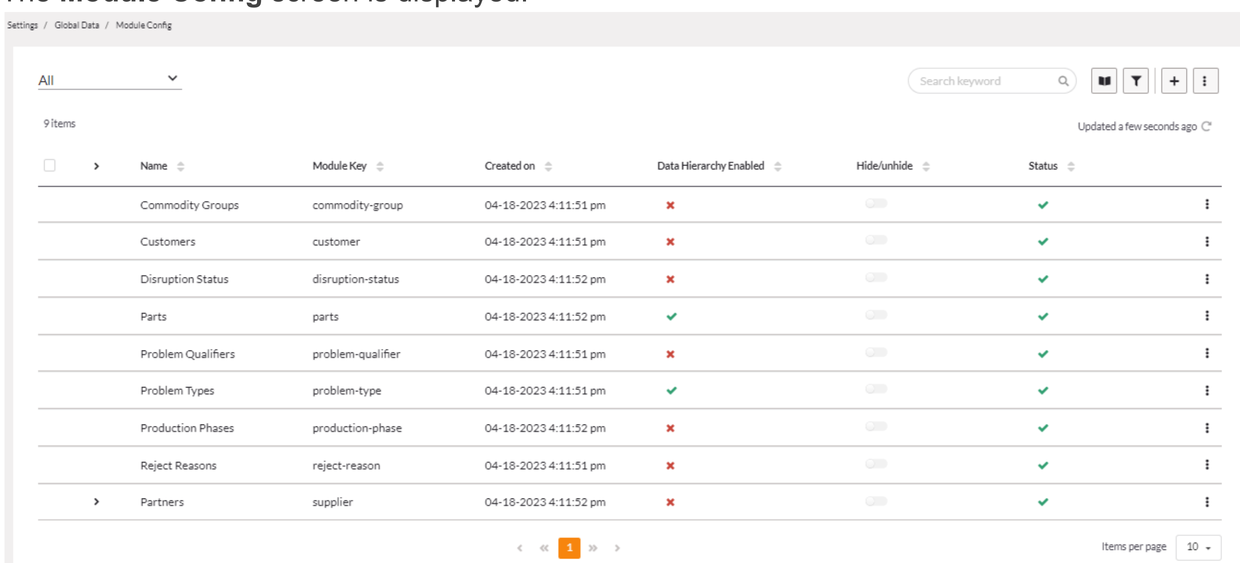
1. Log in to the iENT Application.

2. Go to **Settings > Global Data**.
   You will be able to view all your existing modules as provided during onboarding of your organization to iENT app.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.

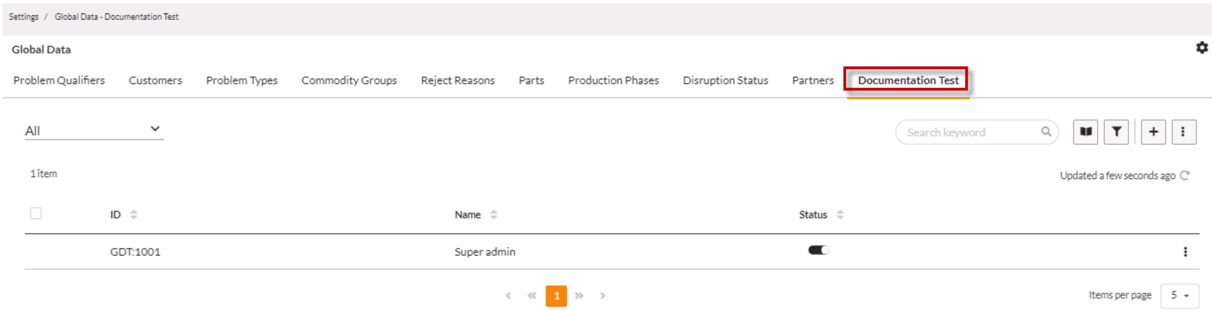
3. Click (**Module Config**) on the top right corner.
   The **Module Config** screen is displayed.



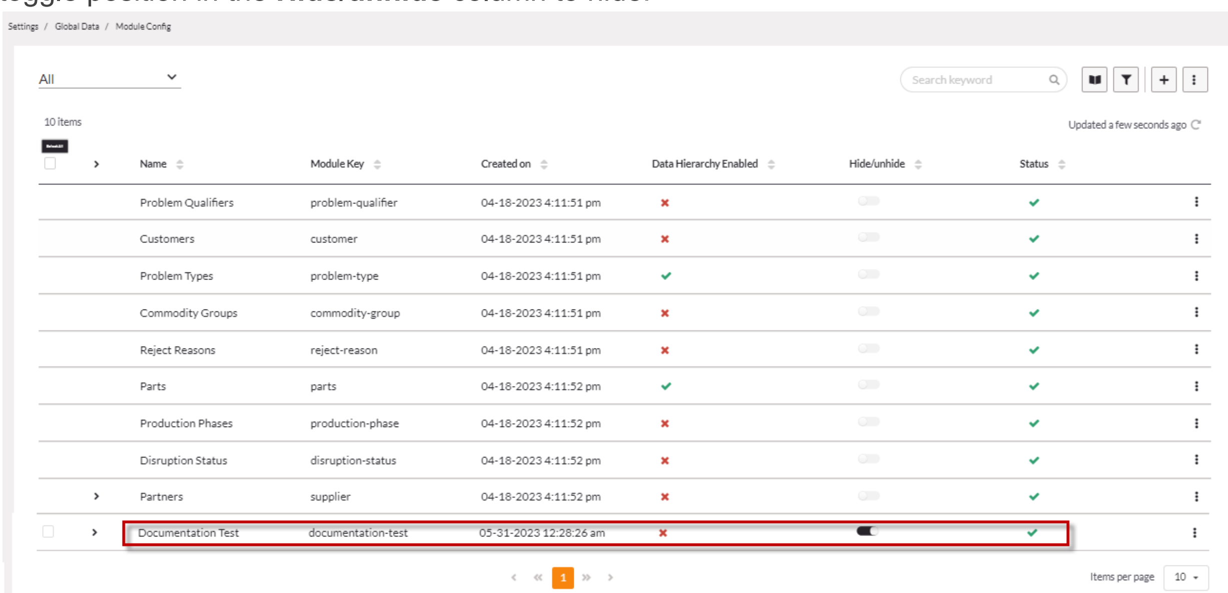
   See *here* to explore how you can search, view, sort, and filter all the displayed records.

4. Change the position of toggle in the **Hide/unhide** column against the global data module to make it hidden/unhidden.
   Note: The **Partners** module and its sub-modules cannot be hidden.

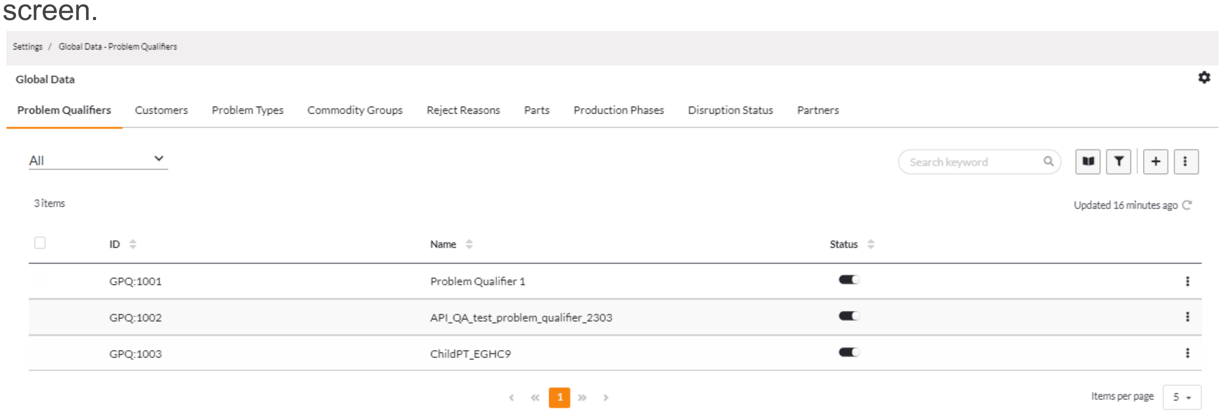
   Example of hiding a global data module named **Documentation Test**.
   The following **Global Data** screen displays all the modules available including **Documentation Test**.



In the **Module Config** screen, against the **Documentation Test** module changing the toggle position in the **Hide/unhide** column to hide.



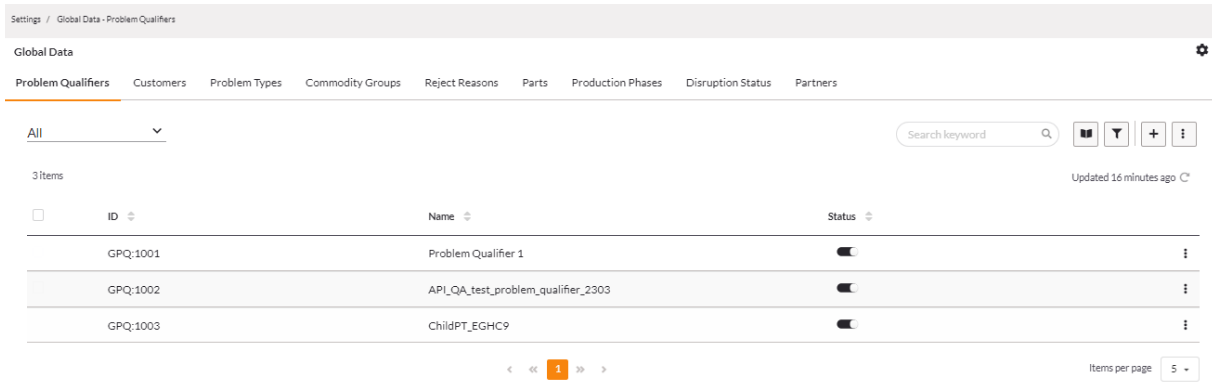
The **Documentation Test** module gets hidden and is removed from the **Global Data** screen.



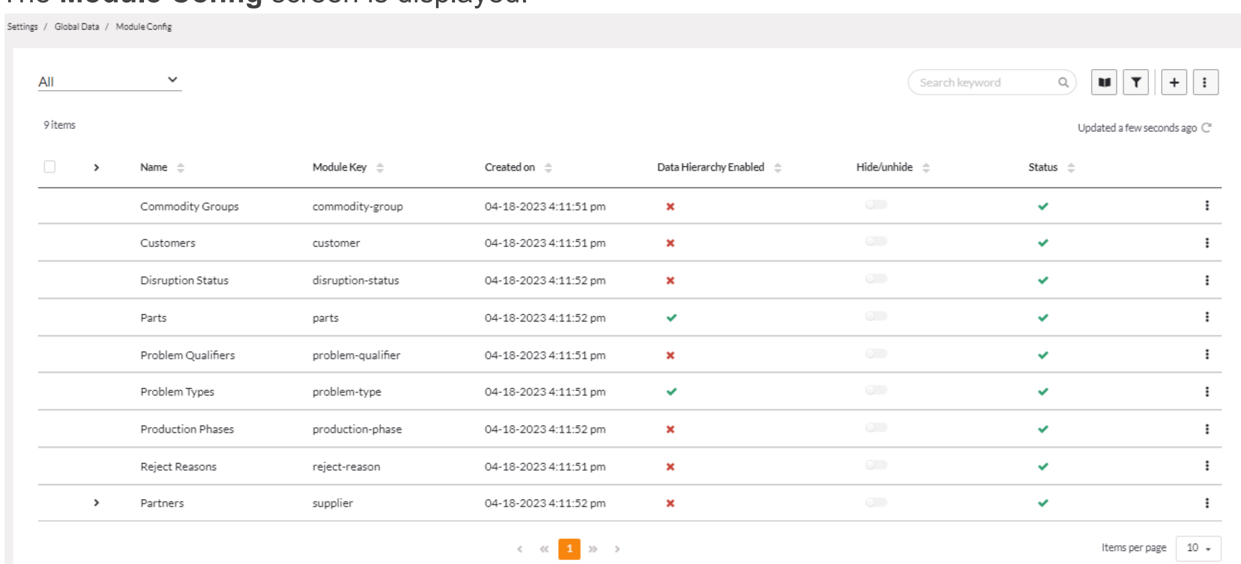
Create New Global Data Module

To create a new global data module:

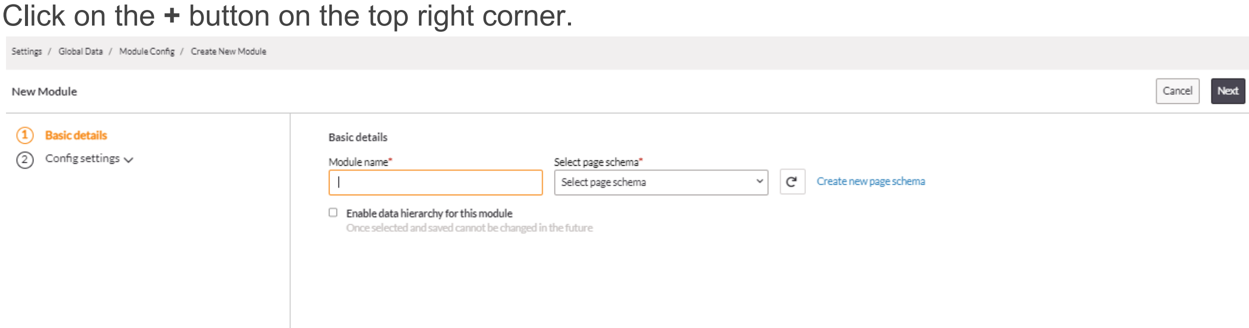
1. Log in to the iENT Application.
2. Go to **Settings > Global Data**.
   You will be able to view all your existing modules as provided during onboarding of your organization to iENT app.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. Click (**Module Config**) on the top right corner.
   The **Module Config** screen is displayed.



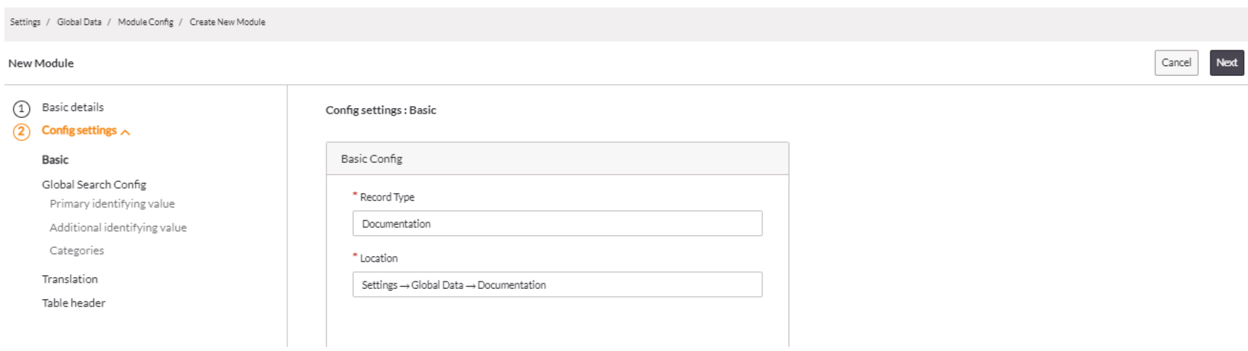
   See *here* to explore how you can search, view, sort, and filter all the displayed records.
4. Click on the **+** button on the top right corner.



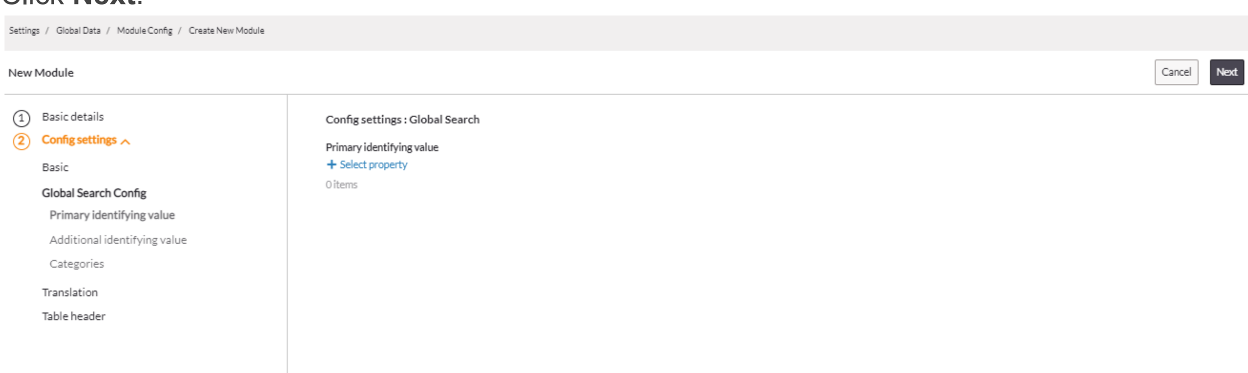
5. Enter the details of the new module being created in the **Basic details** section:
   - **Module Name**: Enter a unique name for the module. This field is mandatory.

- **Select page schema**: From the drop-down list, select the page schema applicable for the module being created. This field is mandatory.
  Note: The list displays only the schemas of the modules provided to the organization during its onboarding process and the new page schemas created by Org Admin. Click **Create new page schema** to create a fresh schema for this module. Once the schema is created, click the refresh button (⟳) to make the new schema available in the list. See *here* how to create dynamic forms and schema.
- **Enable data hierarchy for this module**: Select the checkbox to enable a record in the module to have child record (like parent-child relationship). Keeping the checkbox clear will not allow a record in the module to have child record (no parent-child relationship).
  Note: This option will not be available when editing the module after its creation.

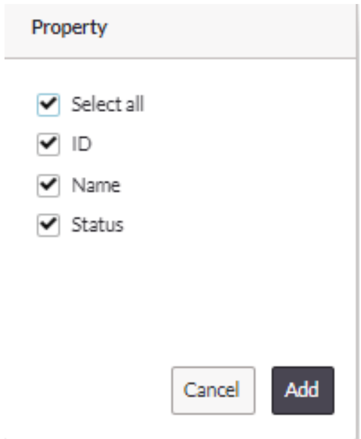
6. Click **Next**.



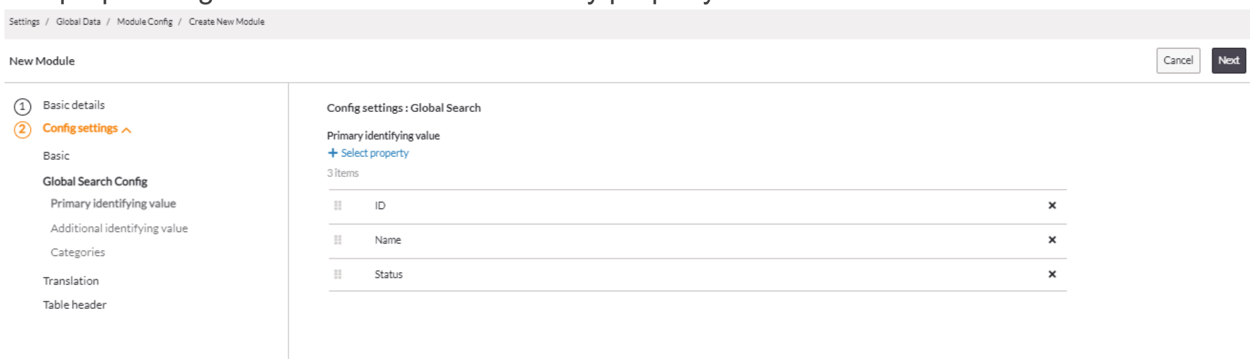
7. Enter the Basic details related to the Global Search Config for the module.
   - **Record Type**: Enter name for the record type. This field is mandatory
   - **Location**: Enter location for the record type. This field is mandatory.
8. Click **Next**.



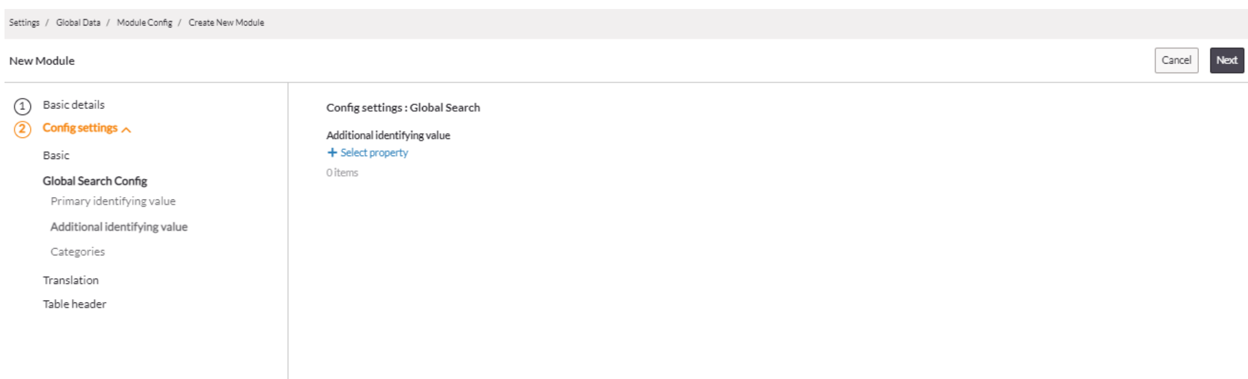
9. Click the **Select property** link to select the primary identifying values related to the Global Search Config for the module.



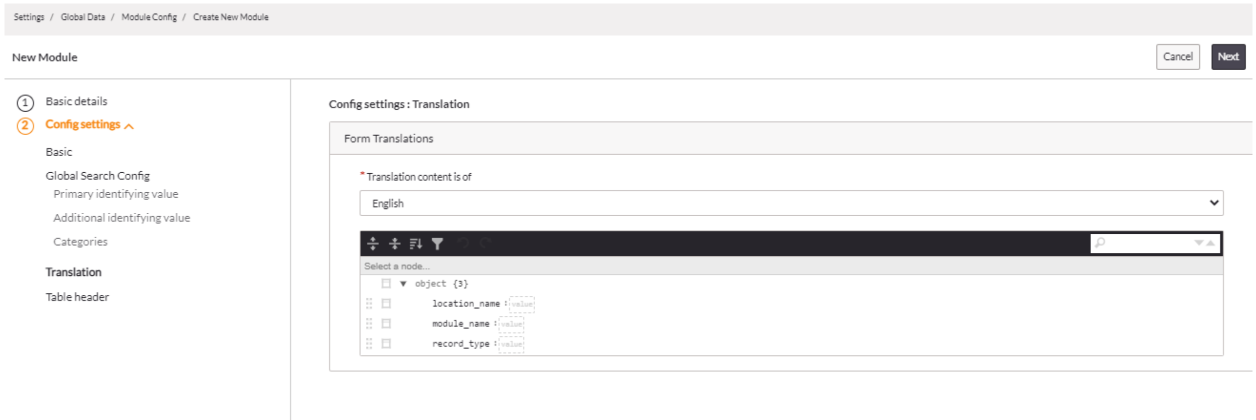
10. Click **Add**.
    The properties get listed. Click the cross if any property is to be deleted.



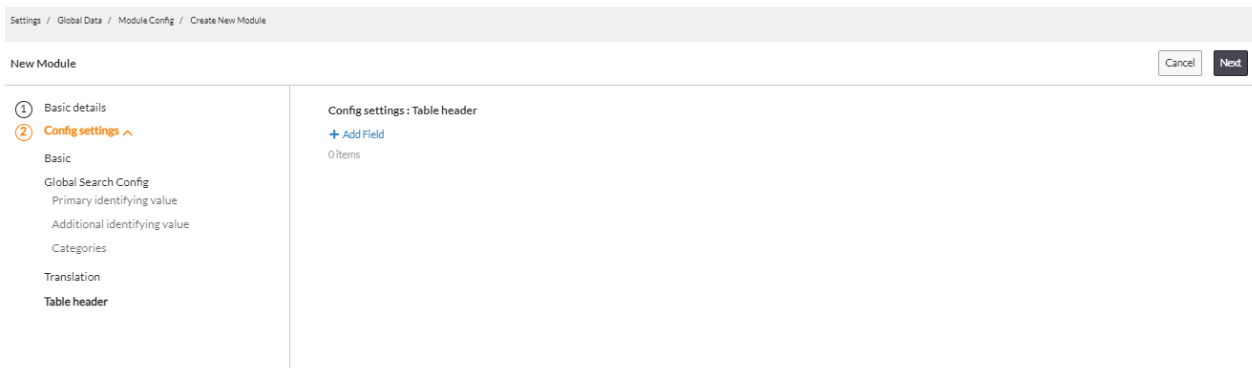
11. Click **Next**.



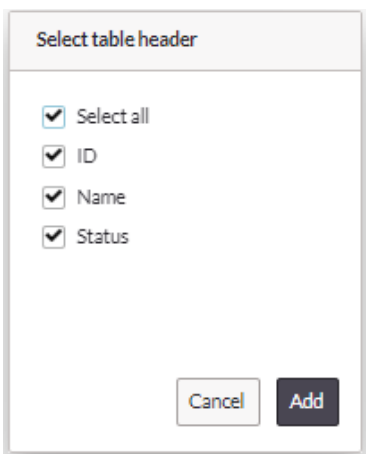
12. Click the **Select property** link to select the additional primary identifying values related to the Global Search Config for the module as done in previous step.
13. Click **Next** to select the categories list similarly for the module.
    Note: If any previous section needs modification, use the link for the section on the left panel.
14. Click **Next**.



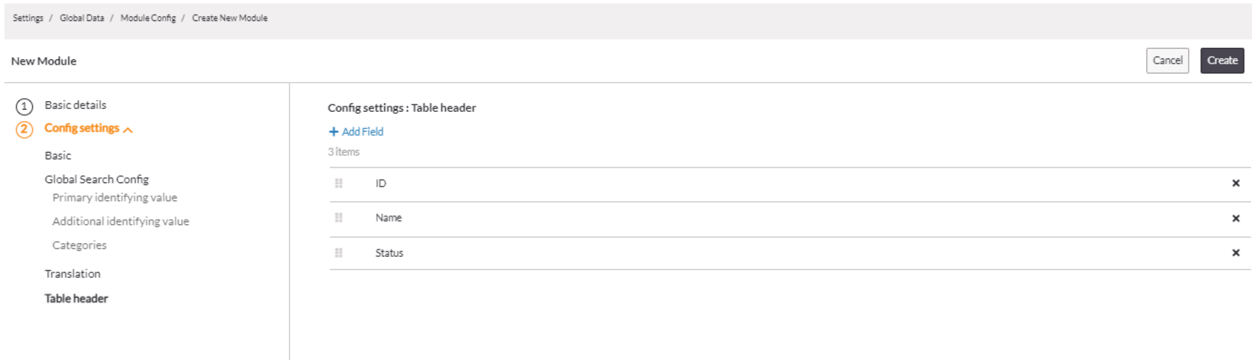
15. In the **Translation** section, select the language from the dropdown list in **Translation content is of** field and provide the corresponding translation against the objects.
16. Click **Next**.



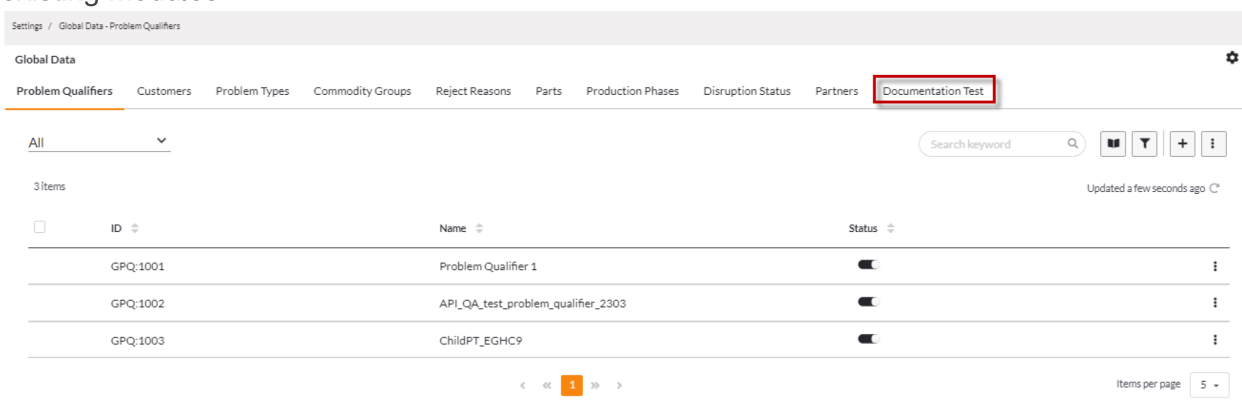
17. In the Table Header section click **Add Field** to select the column headers to be available in the module for the records.



18. Click **Add**.



19. Click **Create**.
    The new module gets created and is listed in the **Global Data** screen along with the existing modules.

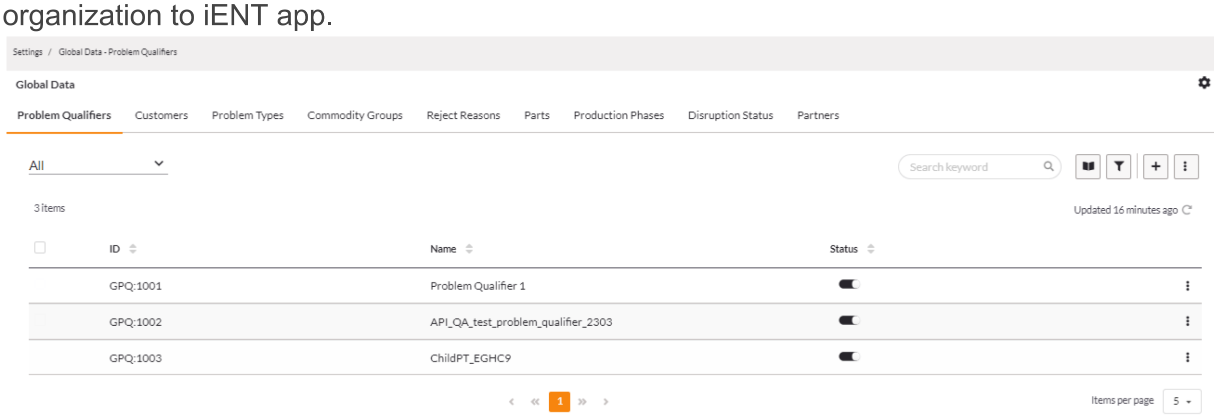


Note: This screen displays the newly created **Documentation Test** module.

Create Sub-module for an Existing Module

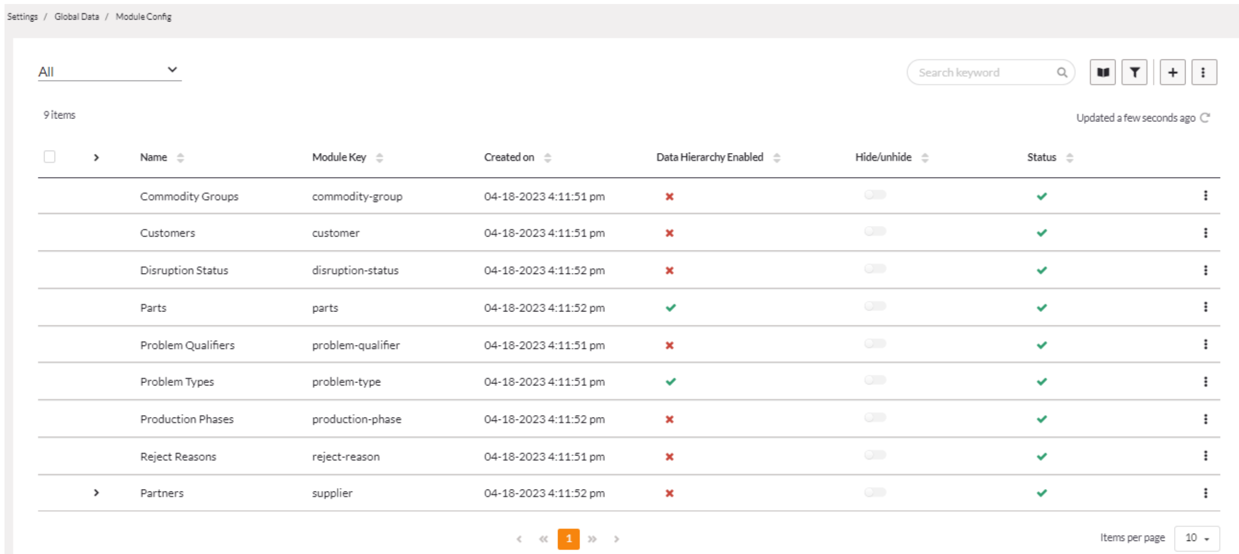
To create a sub-module for an existing module or another sub-module:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data**.
   You will be able to view all your existing modules as provided during onboarding of your organization to iENT app.

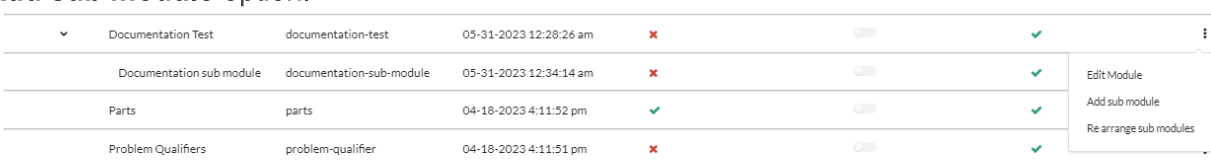


See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. Click (**Module Config**) on the top right corner.
   The **Module Config** screen is displayed.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.
4. Click the kebab menu against the module for which you to create a sub-module and click **Add sub module** option.



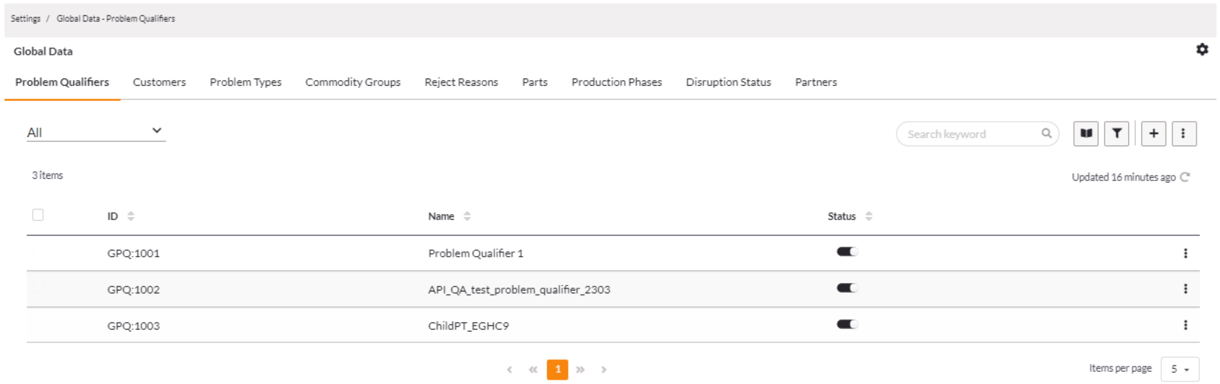
5. Follow the steps used in creation of module to create the sub-module. See here how to create a module.
   Note: Once a sub-module is created, it can be accessed through the records listed in the module.

Edit a Module/Sub-Module and Delete a Sub-module

A module and its sub-module can be edited. However, if any fields are updated or deleted in the **Page Schema** section, data is to be reentered.
A sub-module can be deleted and data related to the sub-module will become unavailable across the apps. The data related to parent module will not be affected.
Note: A sub-module can be deleted but not a module. A module can only be hidden.

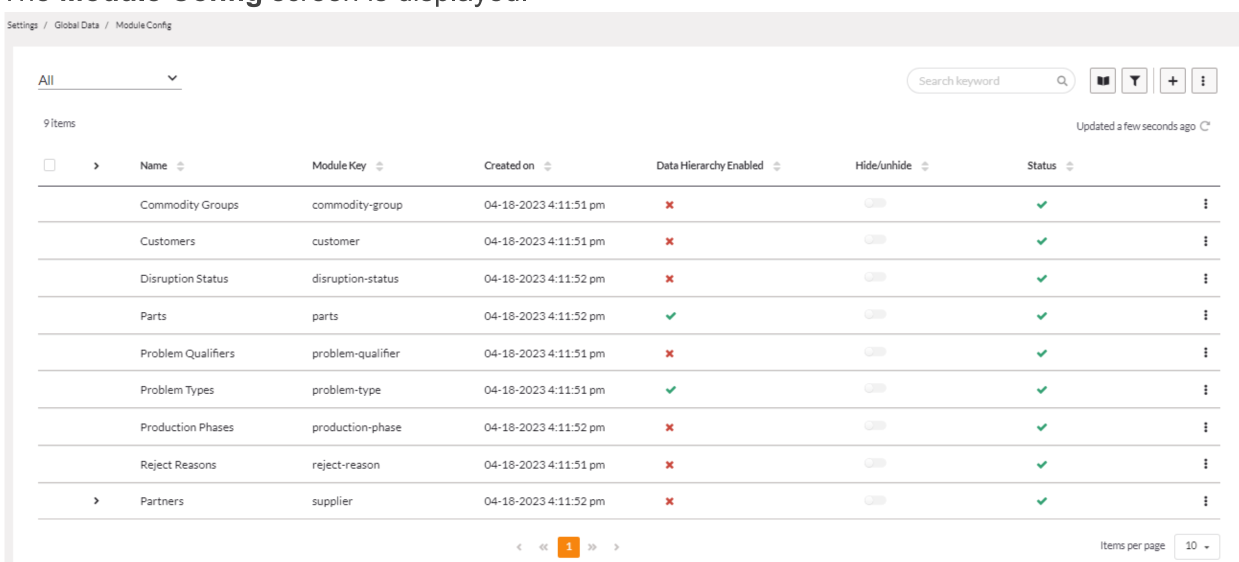
To edit a module/sub-module or delete a sub-module:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data**.
   You will be able to view all your existing modules as provided during onboarding of your organization to iENT app.



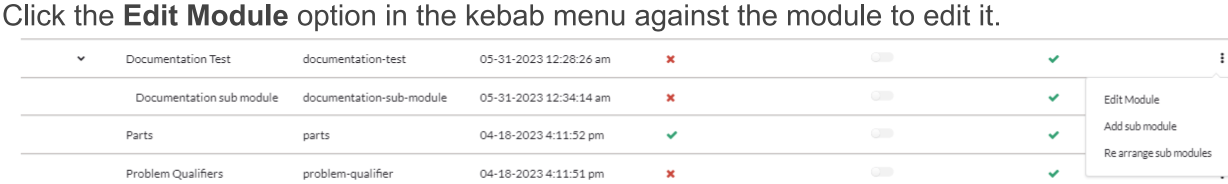
See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. Click (**Module Config**) on the top right corner.
   The **Module Config** screen is displayed.

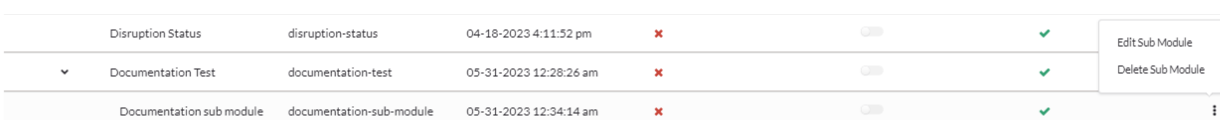


See *here* to explore how you can search, view, sort, and filter all the displayed records.

4. Click the **Edit Module** option in the kebab menu against the module to edit it.



5. Click the **Edit Sub Module** option in the kebab menu against the sub-module to edit it.



6. Click the **Delete Sub Module** option in the kebab menu against the sub-module to delete it.

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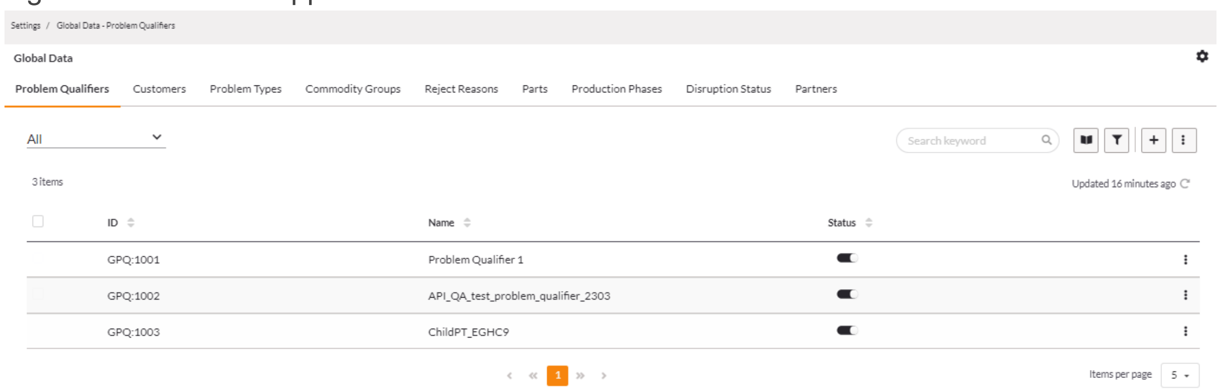
Rearrange Modules and Sub-Modules

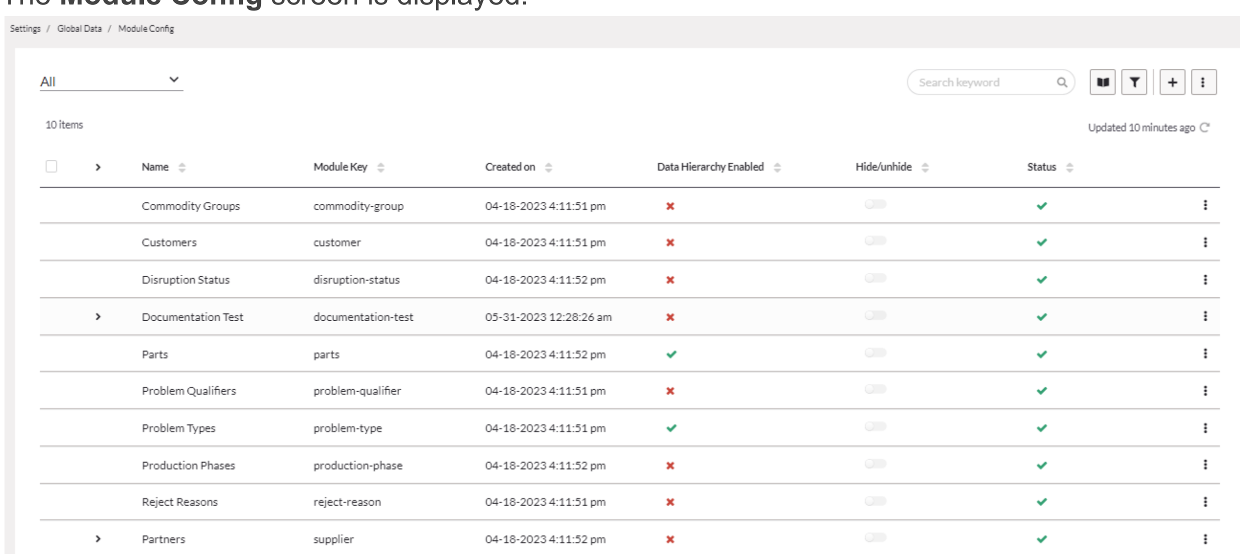
Order of appearance of the modules in the **Global Data** screen and order of appearance of sub-modules within a module can be set as required.

To rearrange modules or sub-modules:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data**.
   You will be able to view all your existing modules as provided during onboarding of your organization to iENT app.



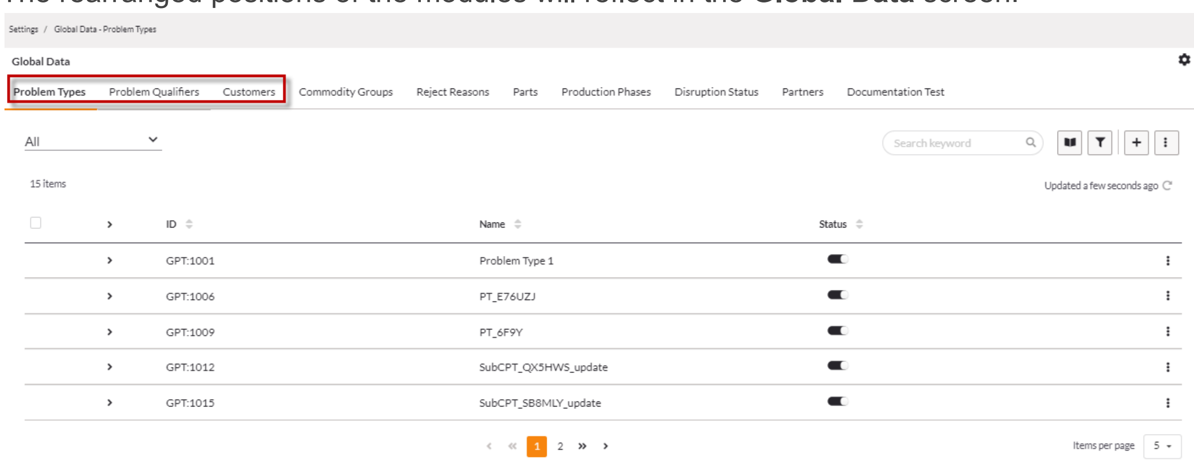
   See *here* to explore how you can search, view, sort, and filter all the displayed records.
   Note: In the **Global Data** screen, modules **Problem Qualifiers**, **Customers** and **Problem Types** appear in a sequence. To show rearranging of modules feature, will change the positions of these three modules.
3. Click ⚙ (**Module Config**) on the top right corner.
   The **Module Config** screen is displayed.



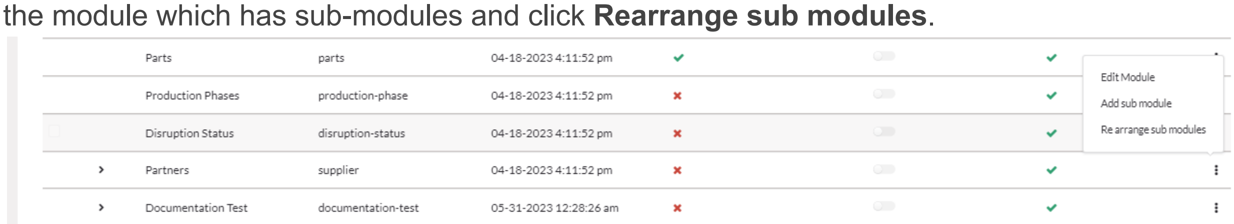
   See *here* to explore how you can search, view, sort, and filter all the displayed records.

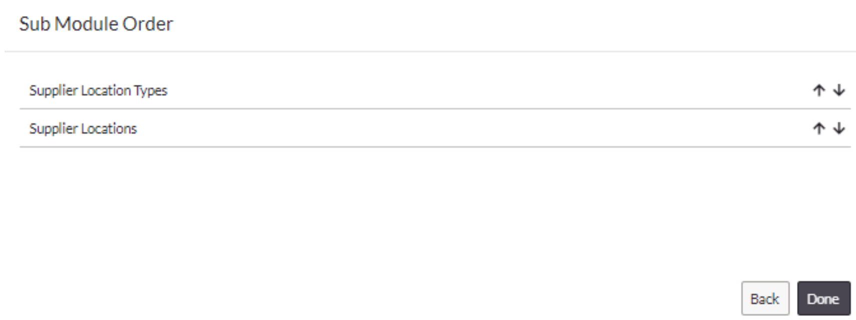
4. To rearrange the modules, click the kebab menu on the top right corner of the screen and click **Rearrange Modules**.

5. Use the up and down arrows to rearrange the modules and click **Done**.
   The rearranged positions of the modules will reflect in the **Global Data** screen.

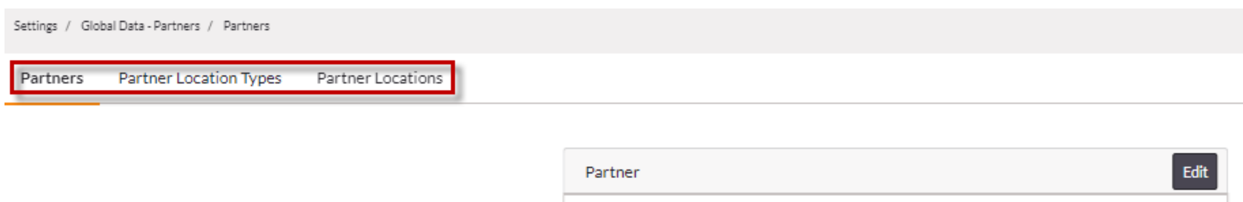


6. To rearrange the sub-modules, in the **Module Config** screen, click the kebab menu of the module which has sub-modules and click **Rearrange sub modules**.





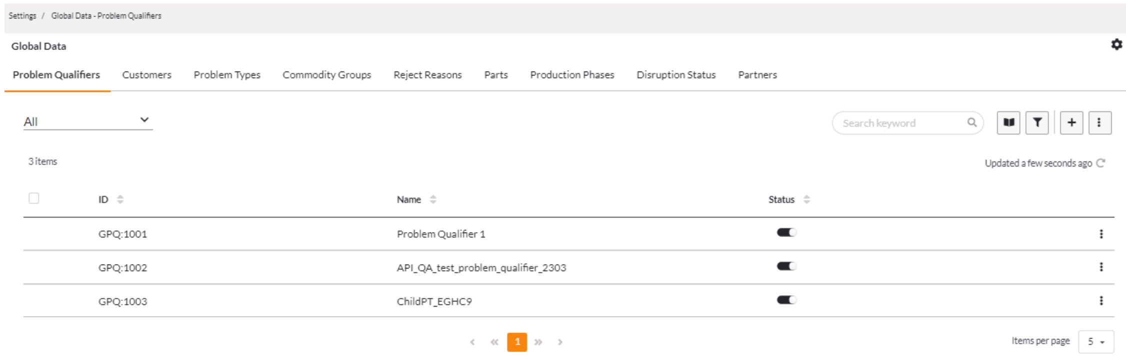
7. Use the up and down arrows to rearrange the modules and click **Done**.
   The rearranged positions of the modules will reflect in the module.
   The following screens display the change in order of appearance of sub modules in the **Partners** module.



Problem Qualifiers

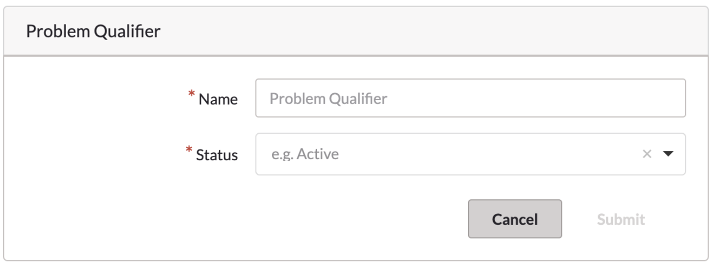
A problem qualifier is a parameter used to qualify a condition as a problem. For example, *warranty expired, repeated problems, customer impacted, etc.* can be defined as problem qualifiers.

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Problem Qualifiers**.
   You will be able to view all your existing problem qualifiers.



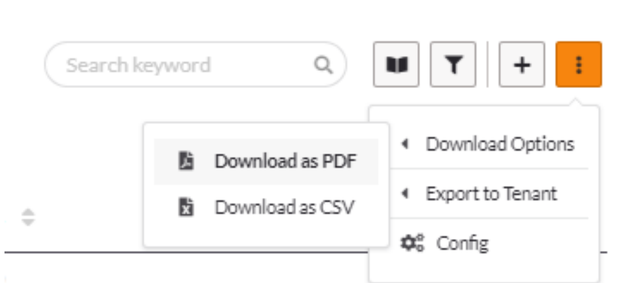
See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. To add a new problem qualifier, click on the **+** button on the top right corner, and add the following mandatory details and click **Submit**:



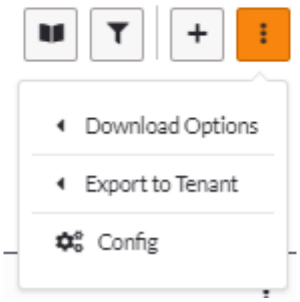
   - **Name**
   - **Status**

4. To download a list of problem qualifiers, select the problem qualifiers and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

5. To export problem qualifiers to a specific tenant, select the particular problem qualifiers and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

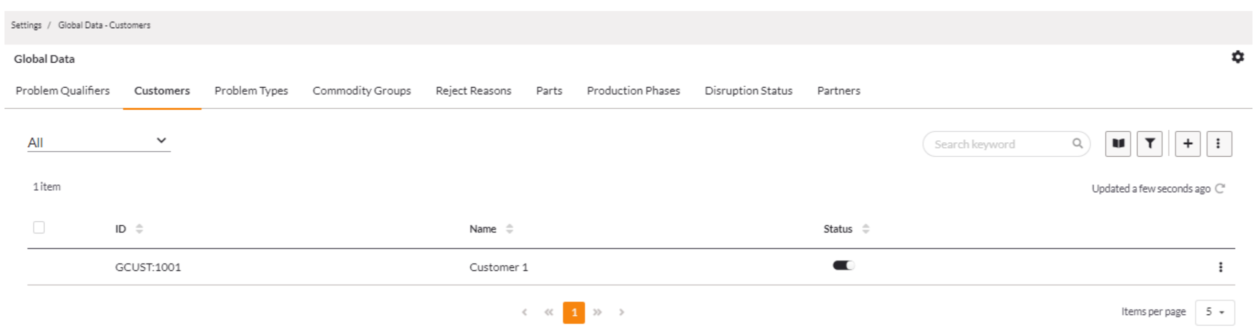


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

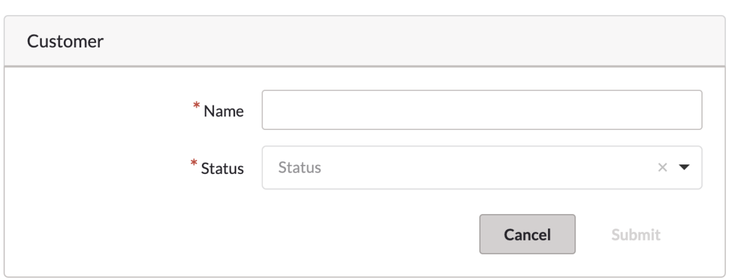
Customers

Under global data, you can also define all the customers of your organization that can be accessed across the platform for all tenant users.

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Customers**.
   You will be able to view all your existing customers.



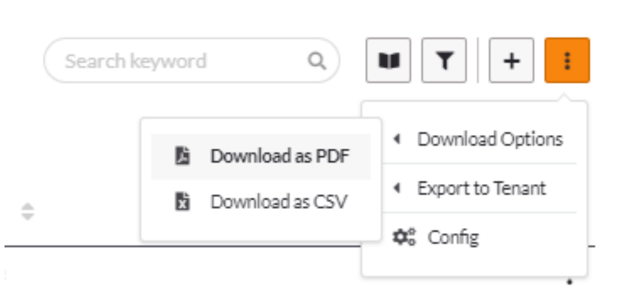
   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add a customer, click on the **+** button on the top right corner, and add the following mandatory details:



   - **Name**

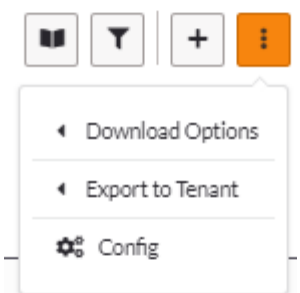
- **Status**

4. To download a list of customers, select the customers and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

5. To export customers to a specific tenant, select the customers and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

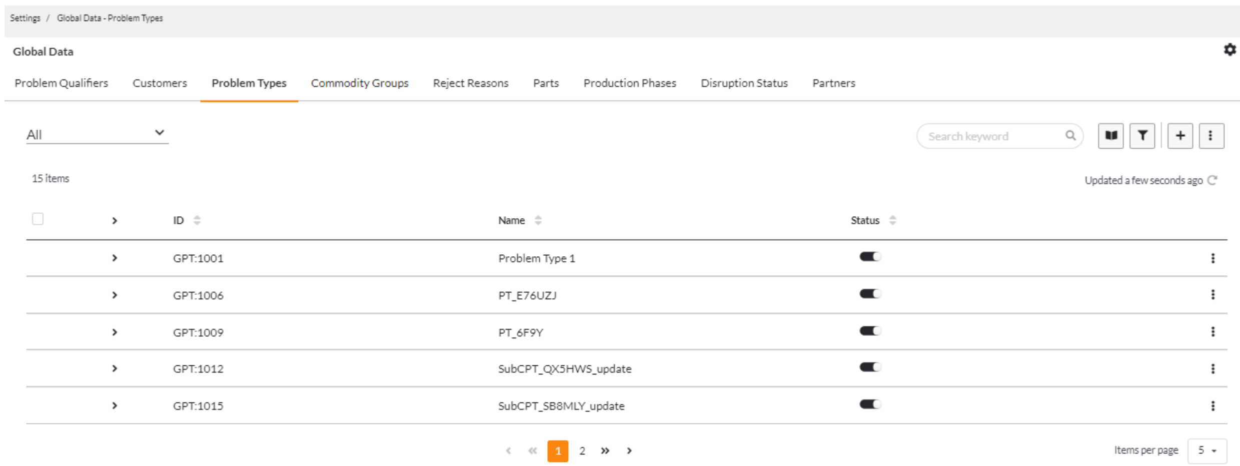


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Problem Types

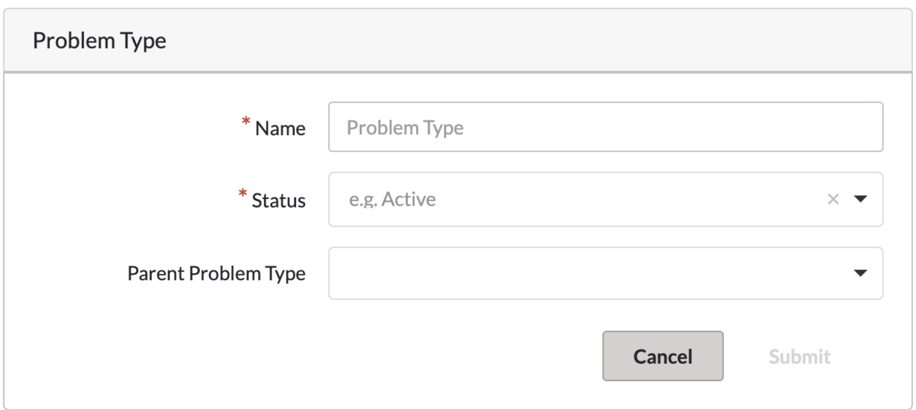
You can define the different kinds of problem types such as *hardware-related* issues, problems corresponding to *documentation,* etc.

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Problem Types**.
3. You will be able to view all your existing problem types. Click on the **>** button to view child records for each problem type.



See *here* to explore how you can search, view, sort, and filter all the displayed records.

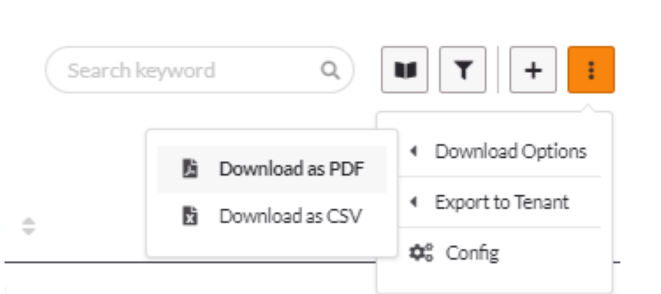
4. To add a problem type, click on the **+** button on the top right corner, and add the following mandatory details:



   - **Name**
   - **Status**

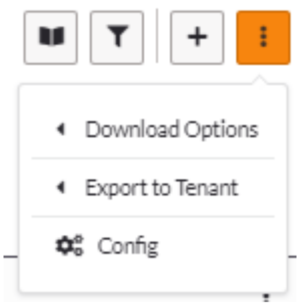
   You can also select a **Parent Problem Type** from the dropdown.

5. To download a list of problem types, select the problem types and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.

   - Download as CSV: Export all the selected records in the data table in CSV format.
6. To export problem types to a specific tenant, select the problem types and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

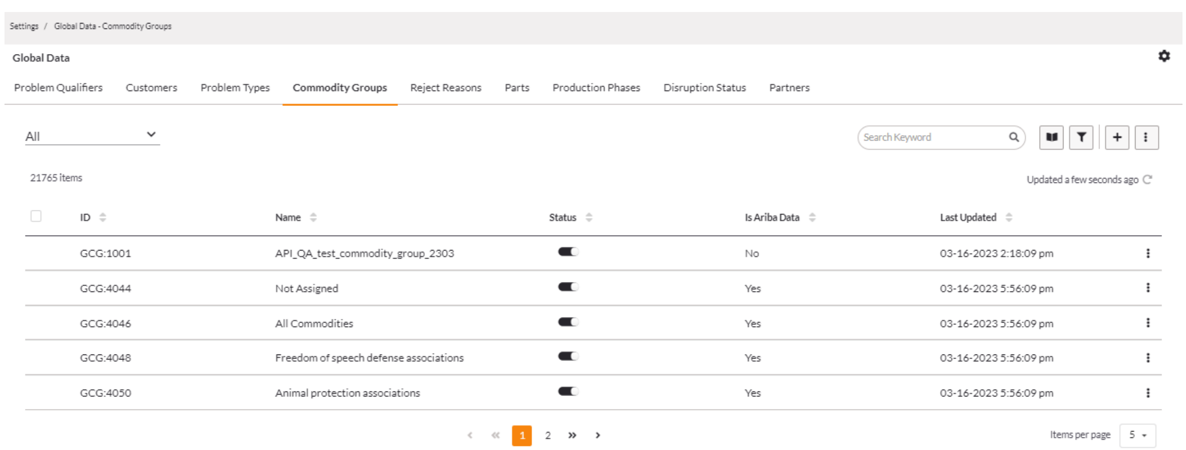


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Commodity Groups

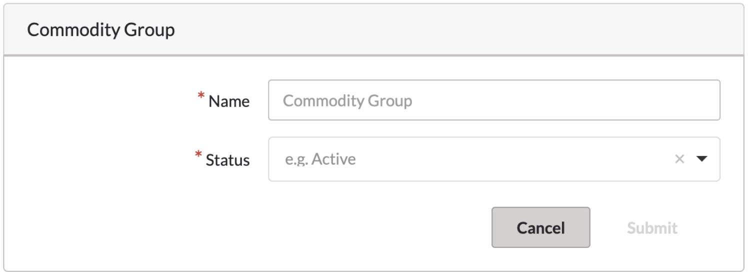
Commodity groups are a set of classification codes used throughout the global marketplace to identify goods and services. You can group goods and services into hierarchical categories such as *Office Supplies, Sports Equipment*, etc. used in catalogs, procurement transactions, sourcing events, and contracts.

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Commodity Groups**.
3. You will be able to view all your existing commodity groups.



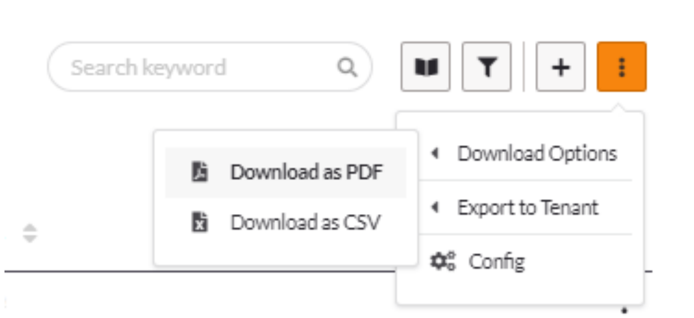
See *here* to explore how you can search, view, sort, and filter all the displayed records.

4. To add a commodity group, click on the **+** button on the top right corner, and add the following mandatory details and click **Submit**:



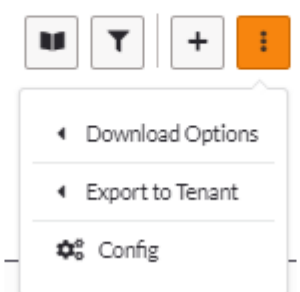
- **Name**
- **Status**

5. To download a list of commodity groups, select the groups and then click on the kebab menu on the top right corner of the screen and select **Download Options.** You can download the list of commodity groups as needed:



- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

6. To export commodity groups to a specific tenant, select the groups and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

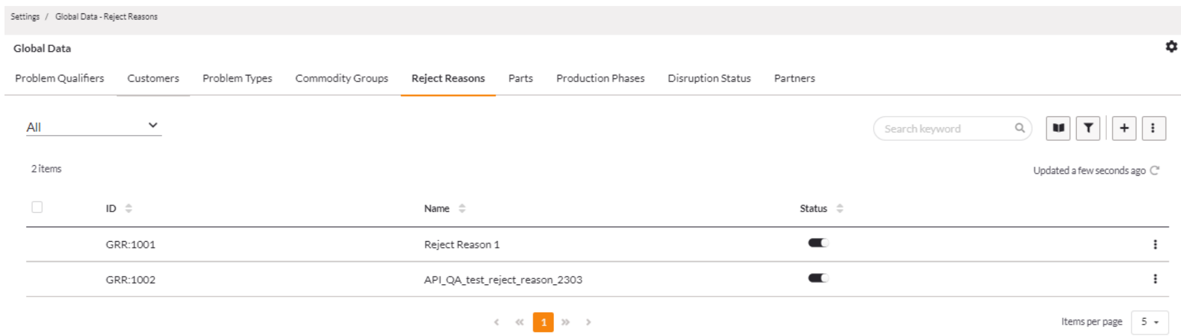


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

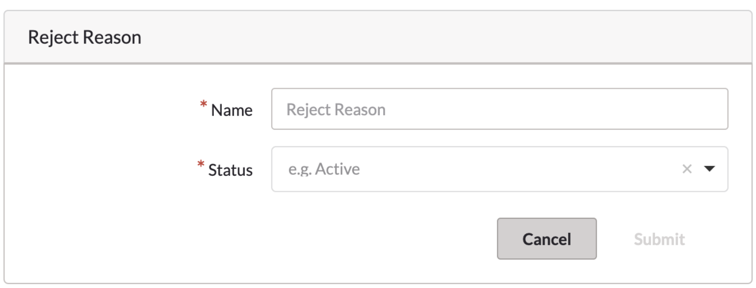
Reject Reasons

You can define different reasons and parameters used to reject a selected action. To do this:

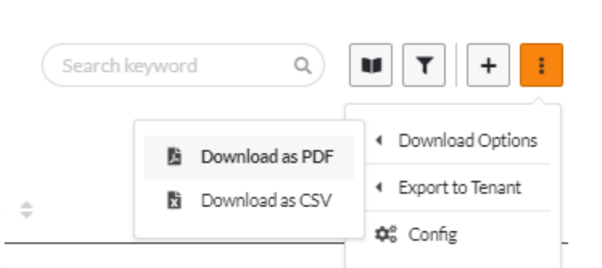
1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Reject Reasons**.
   You will be able to view all your existing reject reasons.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add a reject reason, click on the **+** button on the top right corner, and add the following mandatory details:

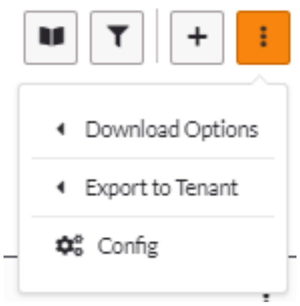


   - **Name**
   - **Status**
4. To download a list of reject reasons, select the reject reason and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.

   - Download as CSV: Export all the selected records in the data table in CSV format.
5. To export reject reasons to a specific tenant, select the reject reason and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

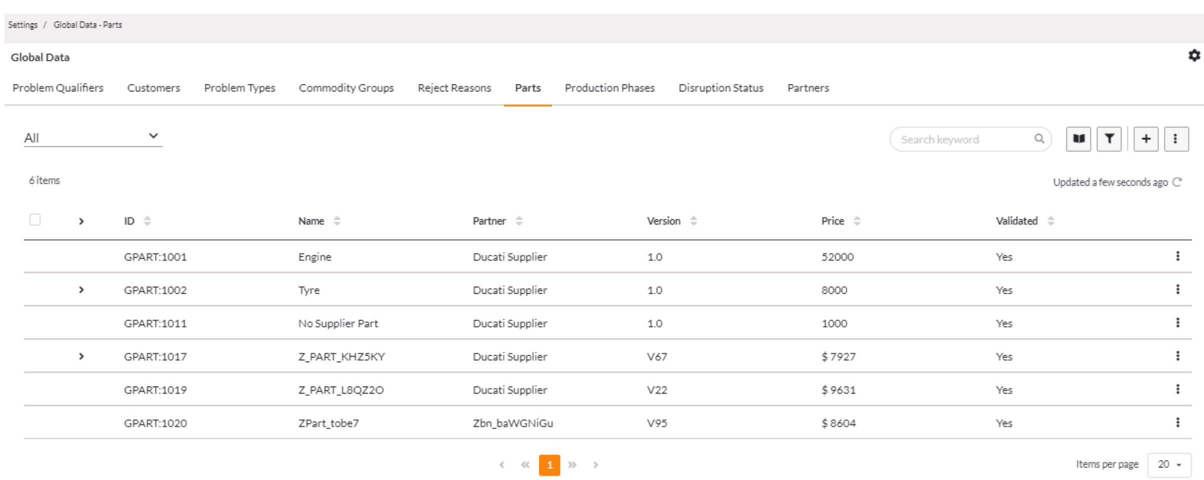


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Parts

You can create parts and their associated information such as part numbers (example: TTSIBM412CID), Partner name, Price, etc to identify a product or service. A part can also be created as a child-part to another existing part. Ensure that partner details are maintained in the system before a part or sub-part is created.

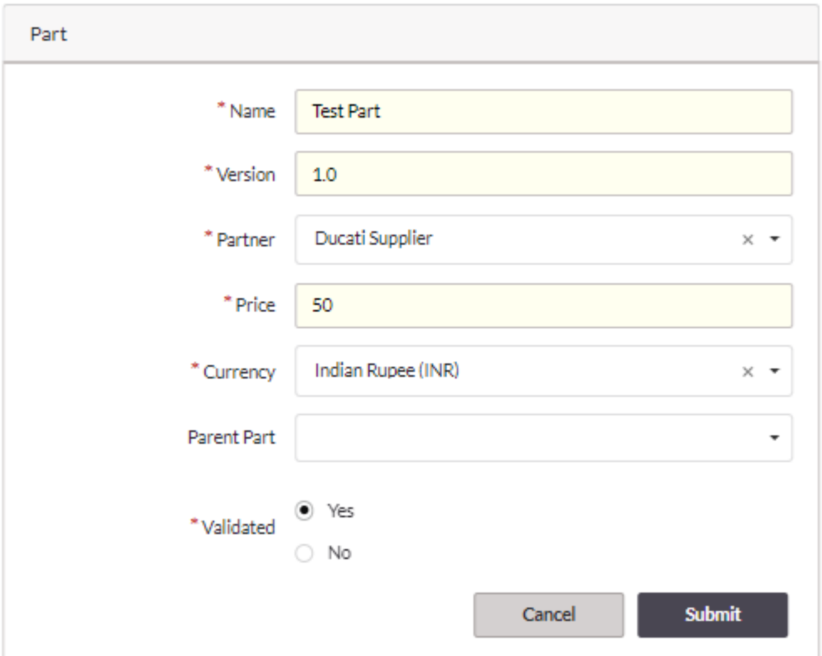
1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Parts**.
   You will be able to view all your existing parts.



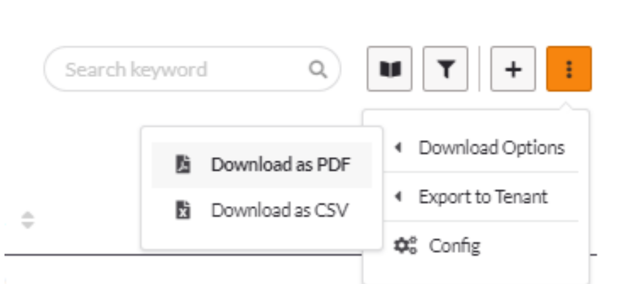
ID	Name	Partner	Version	Price	Validated
GPART:1001	Engine	Ducati Supplier	1.0	52000	Yes
GPART:1002	Tyre	Ducati Supplier	1.0	8000	Yes
GPART:1011	No Supplier Part	Ducati Supplier	1.0	1000	Yes
GPART:1017	Z_PART_KHZ5KY	Ducati Supplier	V67	$ 7927	Yes
GPART:1019	Z_PART_L8QZ2O	Ducati Supplier	V22	$ 9631	Yes
GPART:1020	ZPart_tobe7	Zbn_baWGNiGu	V95	$ 8604	Yes

See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. To add a part, click on the **+** button on the top right corner, and add/select the following mandatory details:



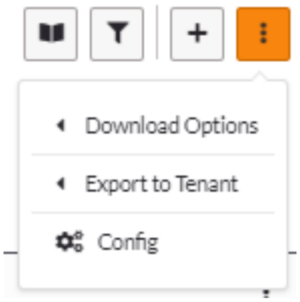
   - **Name**
   - **Version**
   - **Partner**
   - **Price**
   - **Currency**
   - **Parent Part (Optional)**
     Note: If the new part is to be treated as child part to an existing part, select the part from this field.
   - **Validated**
4. Click **Submit**.
5. To download a list of parts, select the parts and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.

- Download as CSV: Export all the selected records in the data table in CSV format.

6. To export parts to a specific tenant, select the parts and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.



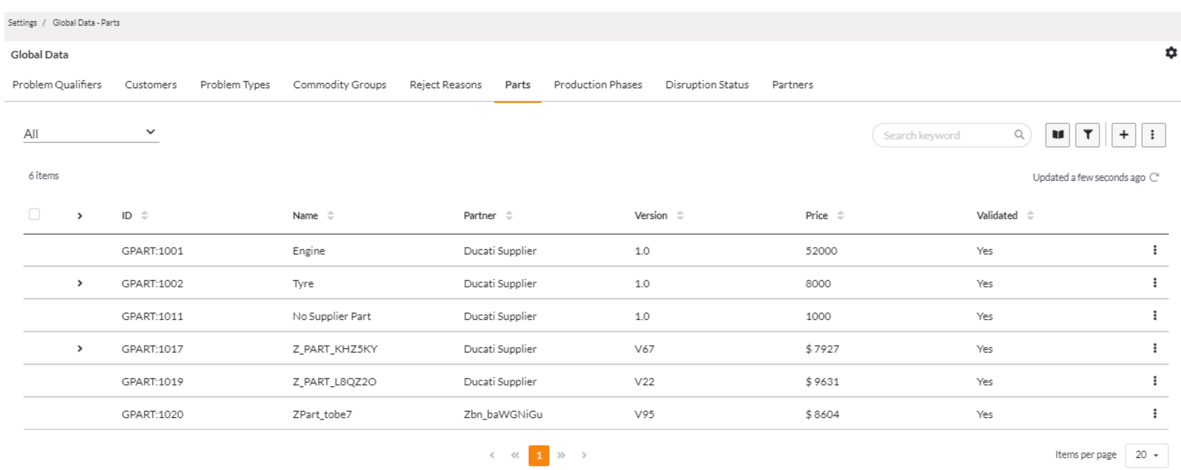
The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Child Part

You can make a part as child part to an existing part. To do this you can use the **Parent Part** option while creating it, as described in the previous section. Alternatively, you can use the kebab menu option of any existing part to add a child part to it.

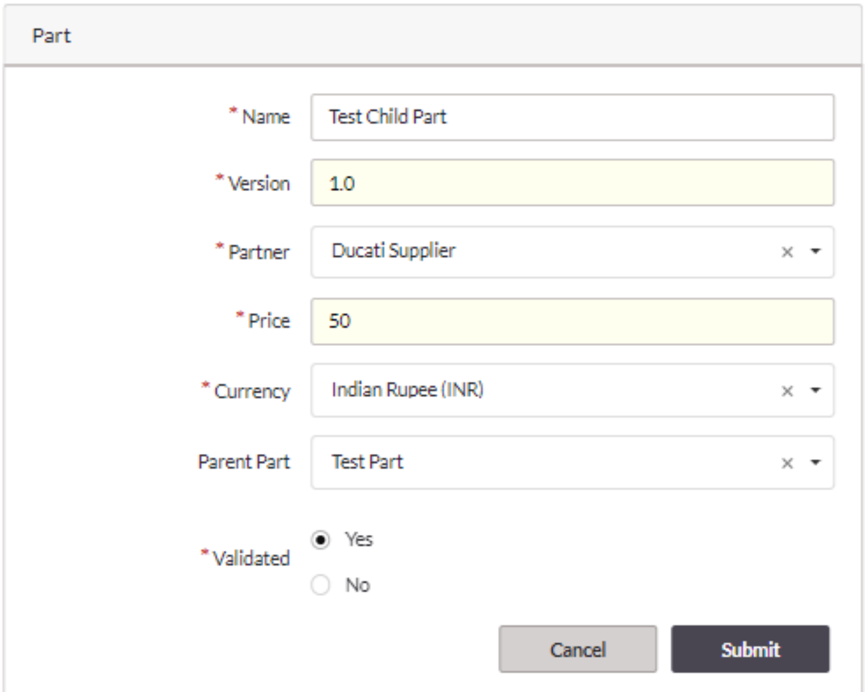
To add a child part to an existing part:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Parts**.
   You will be able to view all your existing parts.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. Click **>** against a part to view its child part.

4. Click the kebab menu of the part to which you want to add a child part and click **+Add** option.
   The **Part** screen is displayed with the pre-selected **Parent Part**.

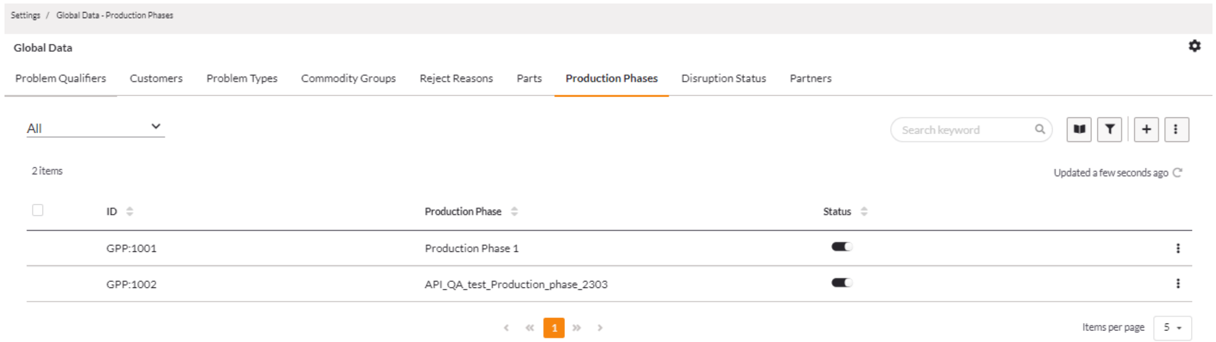


5. Select or enter the following mandatory details:
   - **Name**
   - **Version**
   - **Partner**
   - **Price**
   - **Currency**
   - **Parent Part (Optional)**
     Note: This field is pre-selected and you can change it or remove it, if required. If the value from this field is removed, then the part being created will no longer be a child part to any part.
   - **Validated**
6. Click **Submit**.

Production Phases

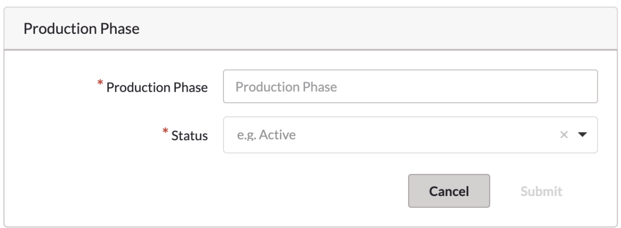
You can define different production phases as required. To do this:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Production Phases**.
   You will be able to view all your existing production phases.



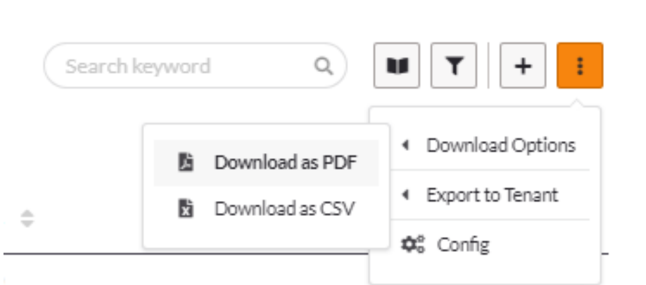
See *here* to explore how you can search, view, sort, and filter all the displayed records.

3. To add a production phase, click on the **+** button on the top right corner, and add the following mandatory details:



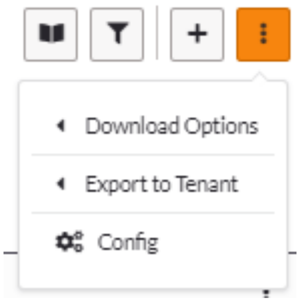
   - **Production Phase**
   - **Status**

4. To download a list of production phases, select the production phases and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

5. To export production phases to a specific tenant, select the production phases and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.

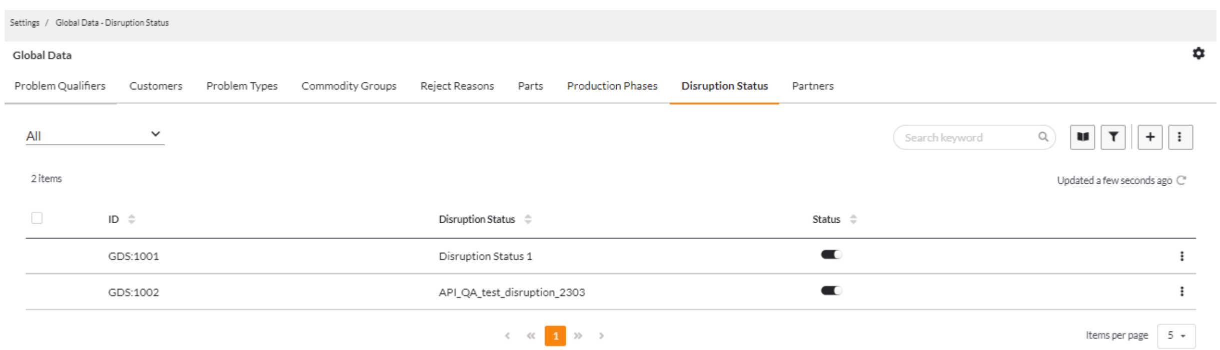


The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

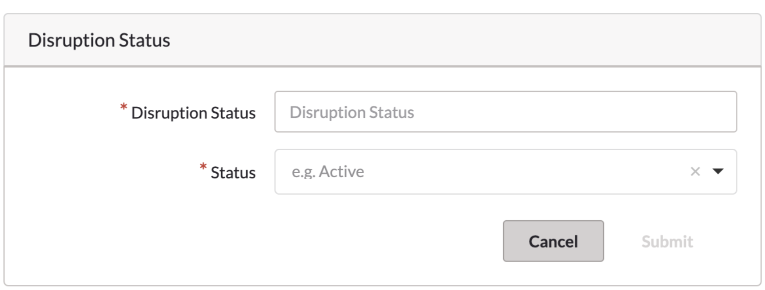
Disruption Status

You can define different disruptions related to production or services. To do this:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Disruption Status**.
   You will be able to view all your existing disruption statuses.

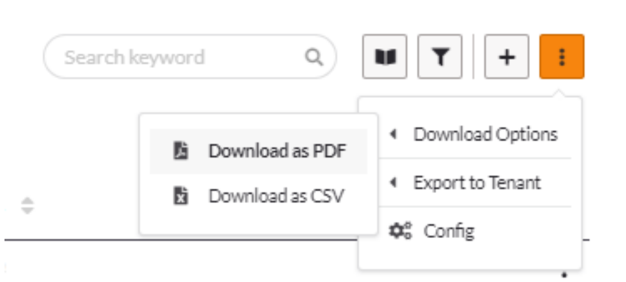


   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add a disruption status, click on the **+** button on the top right corner, and add the following mandatory details:

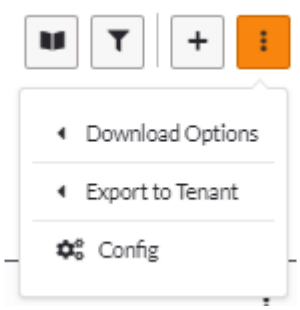


   a. **Disruption Status**
   b. **Status** (*active*/*inactive*)

4. To download a list of disruption statuses, select the particular disruption statuses and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.
5. To export disruption statuses to a specific tenant, select the particular disruption statuses and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.



   The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

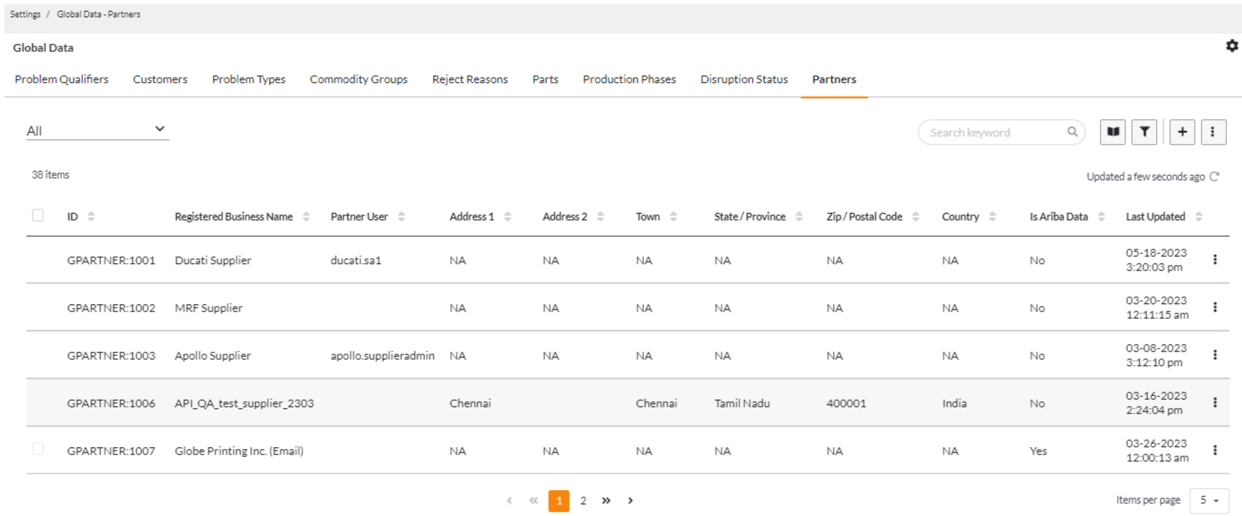
Partners

You can add details of partners (suppliers) to your organization including partner business name and details, location and location types; and associate a partner user with a partner. You can also import the partner details from Ariba, if external authorization is enabled for your organization.

To do this:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Partners**.

You will be able to view all your existing partners.



See *here* to explore how you can search, view, sort, and filter all the displayed records.

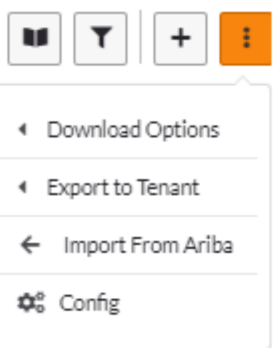
3. To add a partner, click on the **+** button on the top right corner, and add the following mandatory details:
    - **Partner Details**
        - **Registered Business Name**
          Note: This is a mandatory field.
        - **Registered Trade Names**
        - **SAP Vendor Number**
        - **Business Website**
        - **Is this business more than 51% owned by women**
          Note: This is a mandatory field.
        - **Which of these languages are you doing business in?**
          Note: This is a mandatory field.
        - **What is your government issued Business Registration Number**
          Note: This is a mandatory field.
        - **If you have a Dun & Bradstreet number (DUNS) please include it here.**
        - **In what Year was the business Established?**
        - **If you are not the owner who established the business, in what year did you acquire it?**
        - **Please provide a Short Description of your business.**
          Note: This is a mandatory field.
        - **Please provide a Description of your business, Products and Services.**
          Note: This is a mandatory field.
        - **Primary Product / Service Category**
          Note: This is a mandatory field.
        - **Secondary Product / Service Category**
          Note: This is a mandatory field.

- **Number of Full Time Employees**
  Note: This is a mandatory field.
- **Where do you currently focus on selling your products / services?**
  Note: This is a mandatory field.
- **What Are Your Business Current and Future Target Markets?**
  Note: This is a mandatory field.
- **Other Relevant Business Certification (s) - For example, ISO, Diversity, environmental, etc..**
- **In which countries does your business currently provide products or services (distribution area)**
- **What is your current business Legal Structure?**
  Note: This is a mandatory field.
- **Where is your Principal Place of Business?**
  Note: This is a mandatory field.

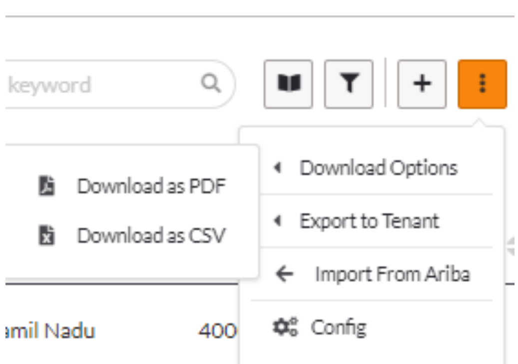
- **Headquarters / Billing Address**
  - **Address 1**
    Note: This is a mandatory field.
  - **Address 2**
  - **Town**
    Note: This is a mandatory field.
  - **State / Province**
    Note: This is a mandatory field.
  - **Zip / Postal Code**
    Note: This is a mandatory field.
  - **Country**
    Note: This is a mandatory field.
  - **Use Different Billing Address**
- **Owner / Manager**
  - **Owner / Manager First Name**
    Note: This is a mandatory field.
  - **Owner / Manager Last Name**
    Note: This is a mandatory field.
  - **Owner / Manager Gender**
    Note: This is a mandatory field.
  - **Owner / Manager Email**
    Note: This is a mandatory field.
  - **Owner / Manager Office Number**
    Note: This is a mandatory field.
  - **Owner / Manager Office Number**
  - **Owner / Manager Fax Number**
  - **What is the Owner / Manager's Job Title?**
    Note: This is a mandatory field.
- **Revenues**

        - **What were your business Revenues in 2021? Please enter in US Dollars.**
          Note: This is a mandatory field.
        - **What were your business Revenues in 2020? Please enter in US Dollars.**
          Note: This is a mandatory field.
    - **Social**
        - **Facebook Handle**
        - **Twitter Handle**
        - **LinkedIN Handle**

4. Click **Submit**.
   The partner details will be listed under the **Partners** tab.
5. You can also import partner details from Ariba. Click **Import from Ariba** option from the kebab menu.

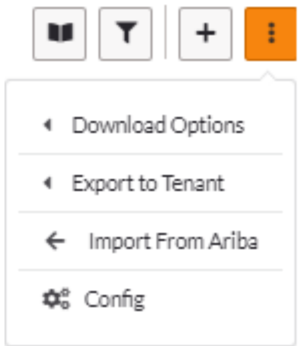


   Note: This option will be available only if External Authorization has been enabled for your organization.
6. To download a list of partners, on the **Partners** tab select the particular partner and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



    - Download as PDF: Export all the selected records in the data table in PDF format.
    - Download as CSV: Export all the selected records in the data table in CSV format.

7. To export partners to a specific tenant, select the particular partners and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.



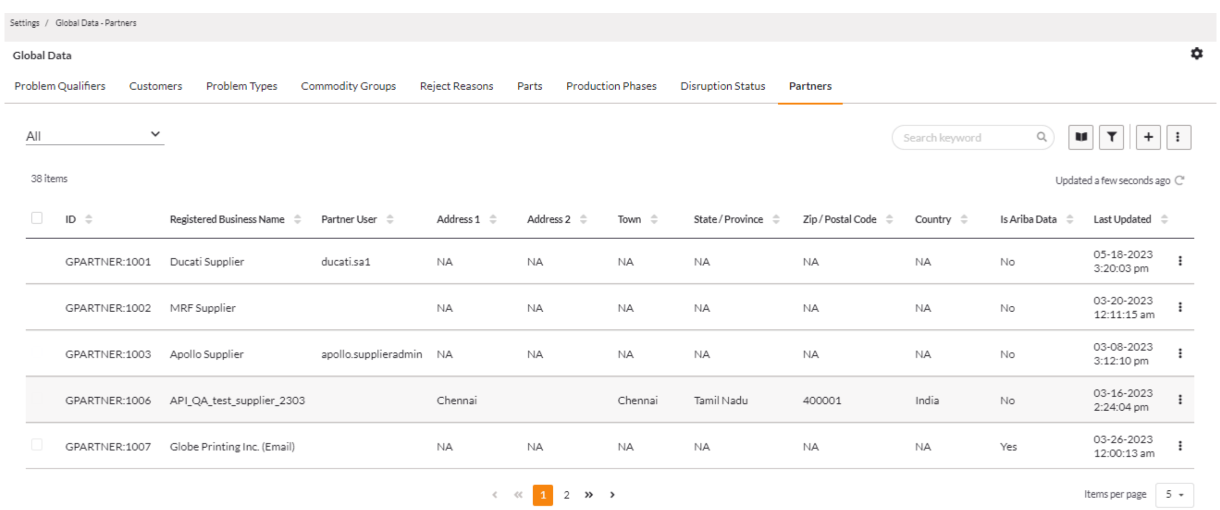
The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

Partner Locations and Partner Location Types

You can add details of the partner's location and its types after partner's organization details are added.

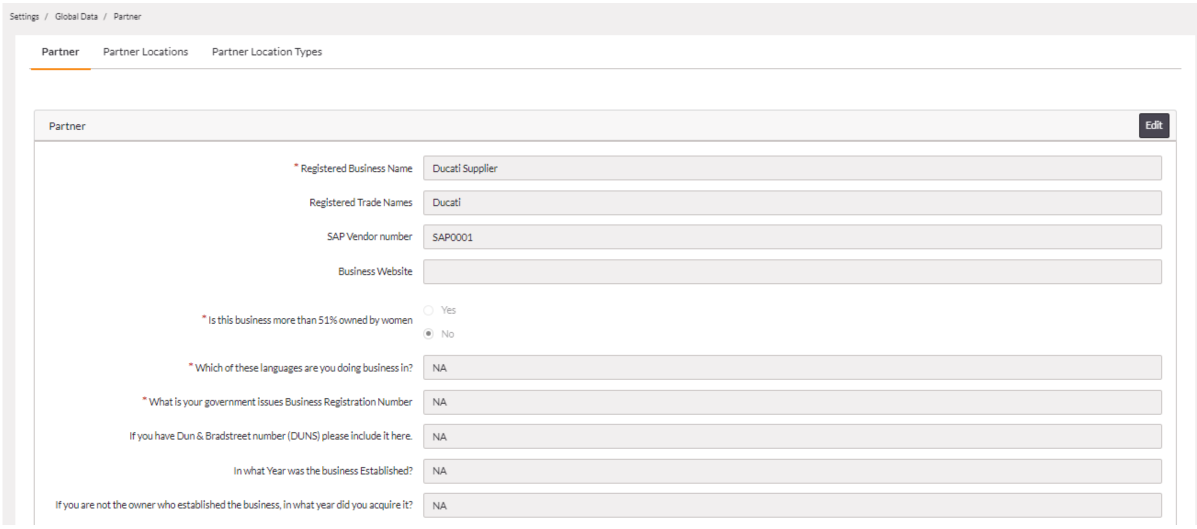
To do this:

1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Partners**.
   You will be able to view all your existing partners.

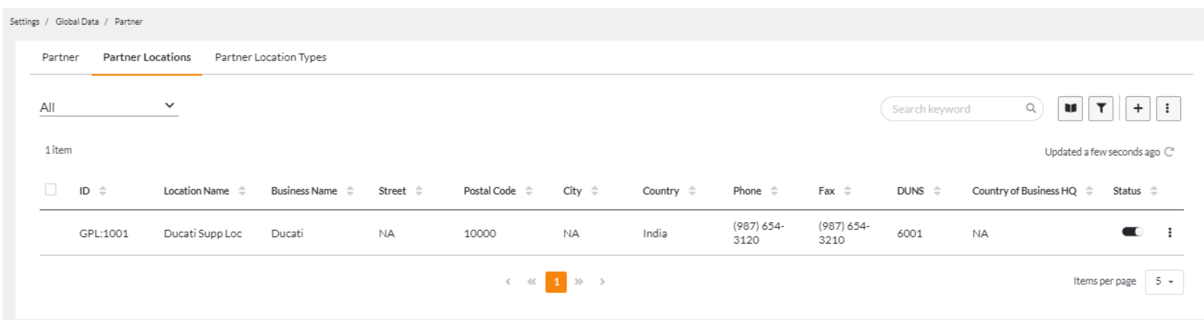


   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To add the partner's location, click on the partner record, or select the partner and click **View** option.

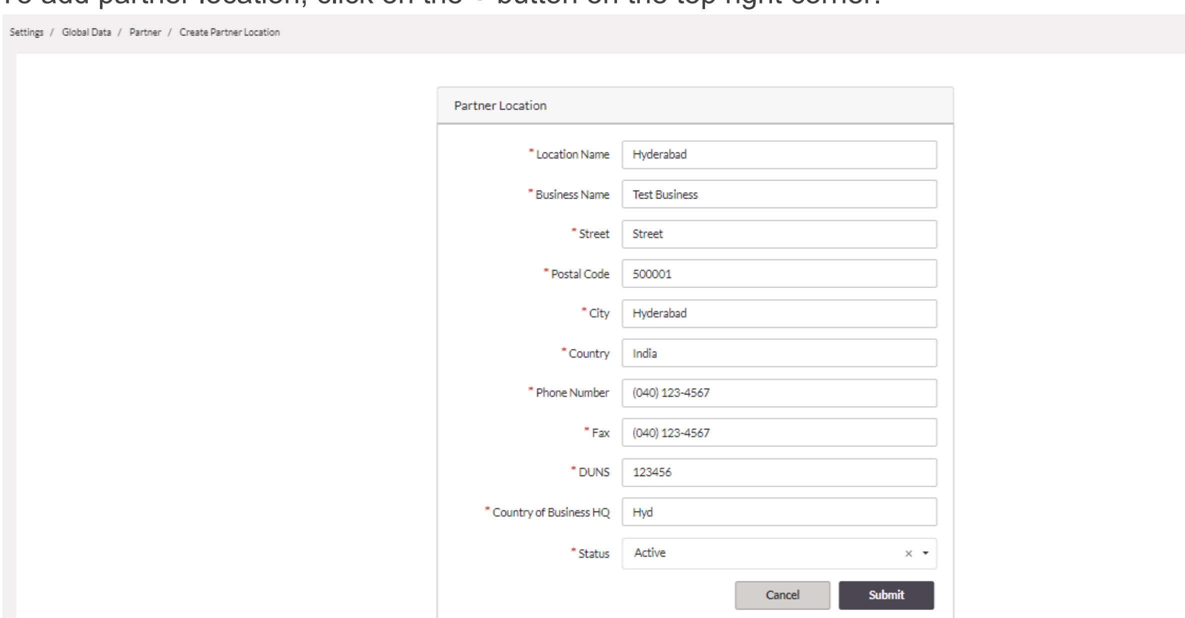
The **Partners** screen is displayed (Use the **Edit** button on this screen, if you are required to make any changes to the partner).



4. Click the **Partner Locations** tab.



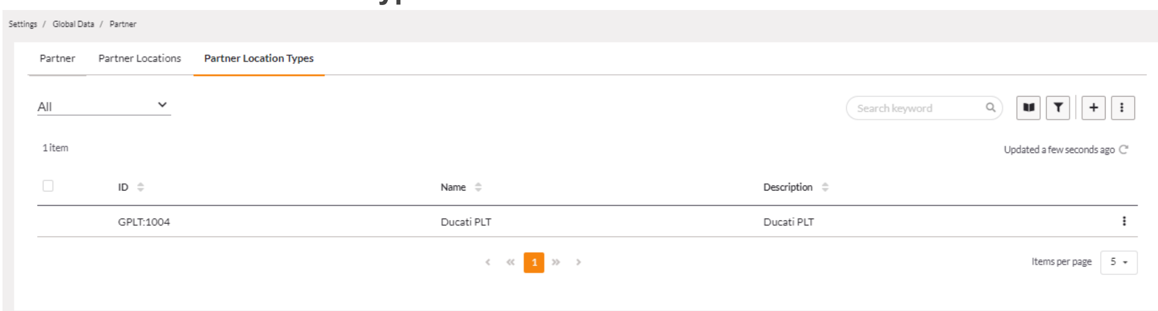
5. To add partner location, click on the **+** button on the top right corner.



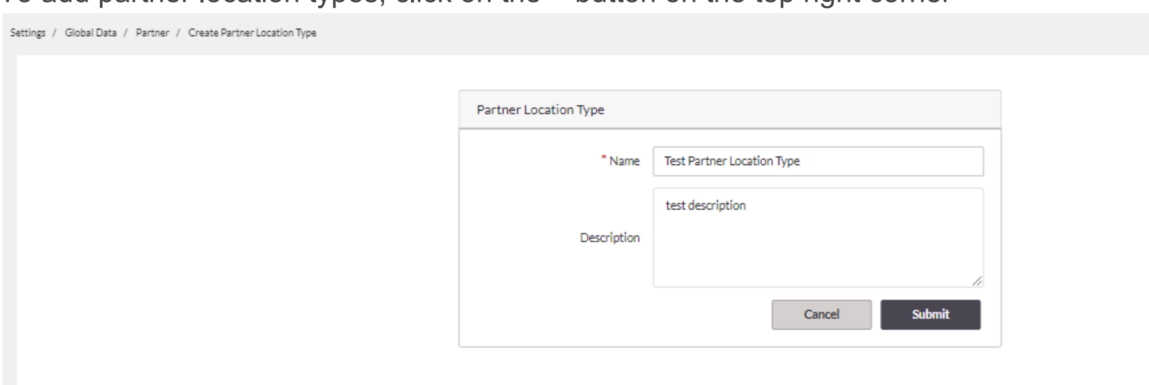
6. Add the following mandatory details:
   - Location Name

- Business Name
- Street
- Postal Code
- City
- Country
- Phone Number
- Fax
- DUNS
- Country of Business HQ
- Status

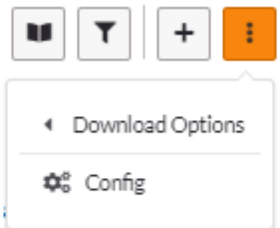
7. Click **Submit**.
   The details get listed under the **Partner Locations** tab.
8. Click the **Partner Location Types** tab.



9. To add partner location types, click on the **+** button on the top right corner



10. Add the following details:
    - Name (mandatory field)
    - Description
11. Click **Submit**.
    The details get listed under the **Partner Location Types** tab
12. To download a list of partner locations or partner location types, select the particular records on the respective tabs and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



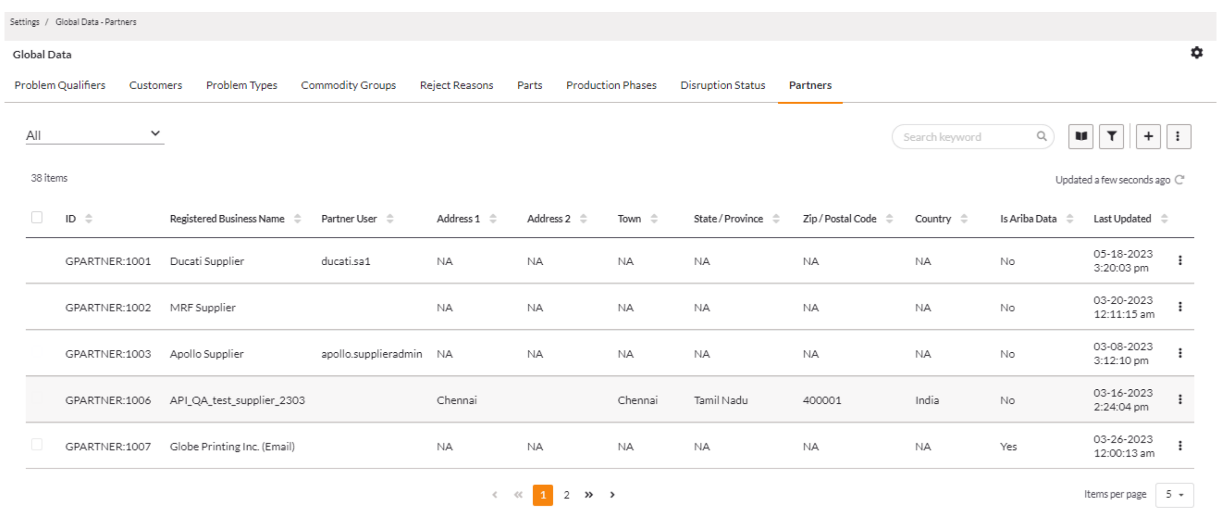
- Download as PDF: Export all the selected records in the data table in PDF format.
- Download as CSV: Export all the selected records in the data table in CSV format.

Associate a Partner User with Partner

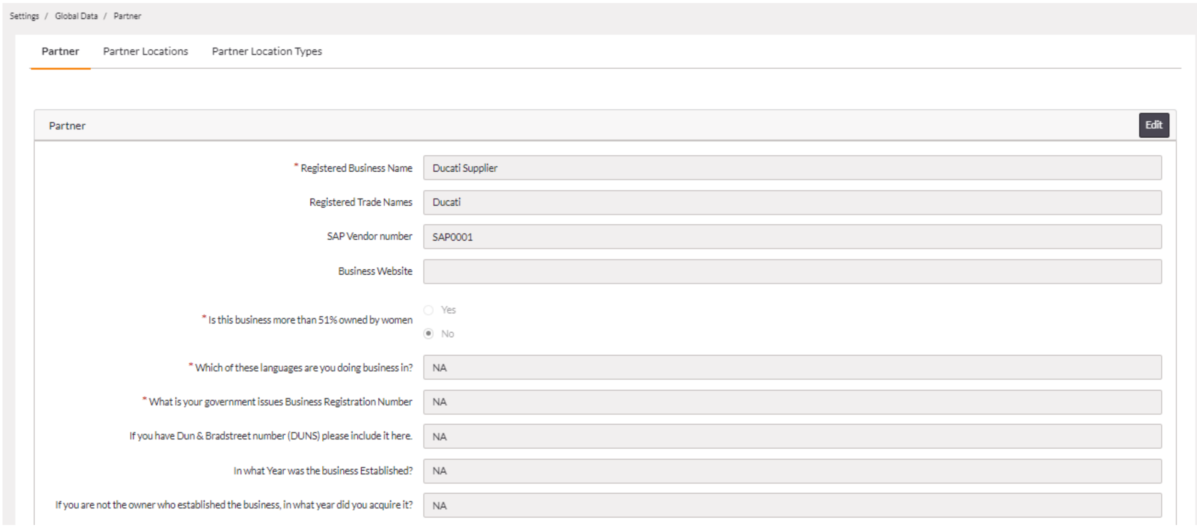
You can associate a partner user with a partner once the partner user is created in the User Management module.

To do this:

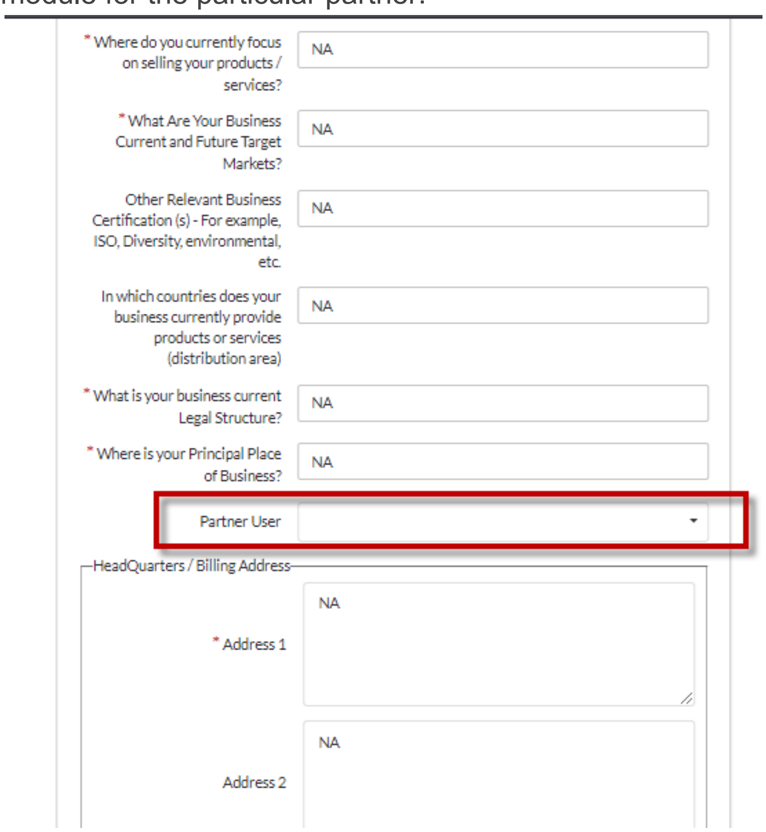
1. Log in to the iENT Application.
2. Go to **Settings > Global Data > Partners**.
   You will be able to view all your existing partners.



   See *here* to explore how you can search, view, sort, and filter all the displayed records.
3. To associate a partner user with a particular partner, click on the partner record, or select the partner and click **View** option.
   The **Partners** screen is displayed (Use the **Edit** button on this screen, if you are required to make any changes to the partner).



4. Click the **Edit** button.
   The screen reloads in editable mode.
5. In the **Partner User** field, from the dropdown list select the user that you want to associate with the partner.
   Note: The dropdown list will only show the users created in the User Management module for the particular partner.



6. Click **Submit**.

Marketplace Applications

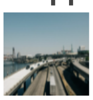
In order to empower customers to utilize the portal's capabilities in the most efficient and optimal manner, iENT offers the Buyer Administrator the ability to create and install applications on the portal. This will help tailor the platform to the needs and requirements of the various workflows of all customers. As the Buyer Administrator, you will be able to view and install different applications that are published onto the iENT Marketplace. Some of these available applications include:

- **Shipping Calendar**

  You can manage all shipping information such as schedule, transit mode, suppliers, parts and destination.

- **Shipping Lanes**

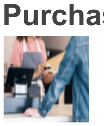
  You can manage supplier and shipping information.

- **Part Sourcing Attributes**

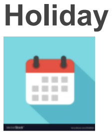
  You can manage suppliers and the different part-sourcing information.

- **Purchase Orders**

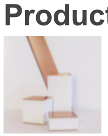
  You can track and manage all your purchase orders.

- **Holiday Calendar**

  Manage all the holiday information across suppliers and customers.

- **Product Transitions**

Manage product cycle and manufacturer details.

- **Supply Chain Issue Management**

  You can manage all your supply chain related issues.

- **Bulletins**

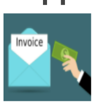
  Configure bulletin parameters to be able to send notifications and tasks accordingly.

- **Supplier Capacity**

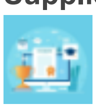
  Manage all your supplier capacity related information.

- **Supplier Invoices**

  Manage supplier invoice information such as order date, amount, invoice number and status.

- **Supplier Certification**

  Manage supplier certification information such as certification name, certification status and certification due date.

- **Yearly Price Negotiation**

  Manage yearly price negotiation details such as quotation, description of task and supplier.

- **Demand Change**

  Manage changes in demand information such as when change request is created, owner and part.

This section covers the following features:

- Marketplace
- App Install Requests

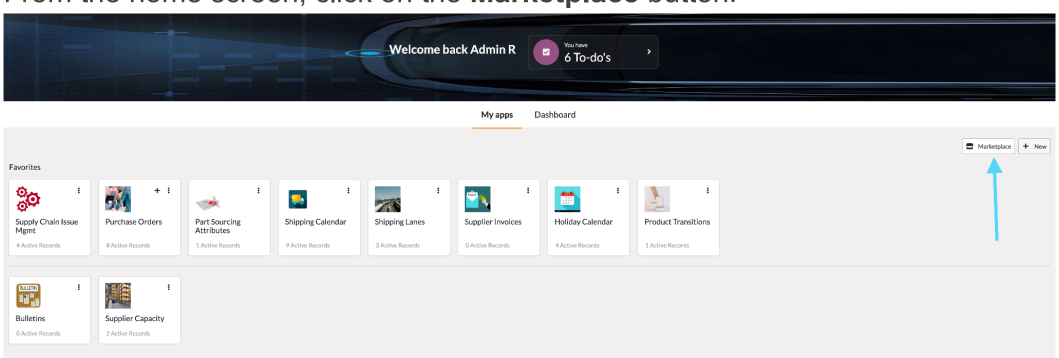
Marketplace

The Marketplace on the iENT portal is where you'll find all applications which are published by different tenants.

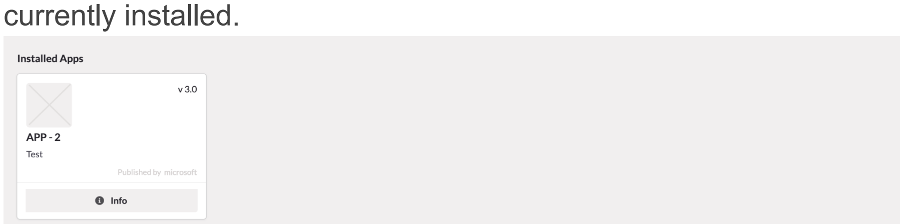
View Applications on the Marketplace

To view all applications that are published to the marketplace:

1. Login to the iENT Application
2. From the home screen, click on the **Marketplace** button.



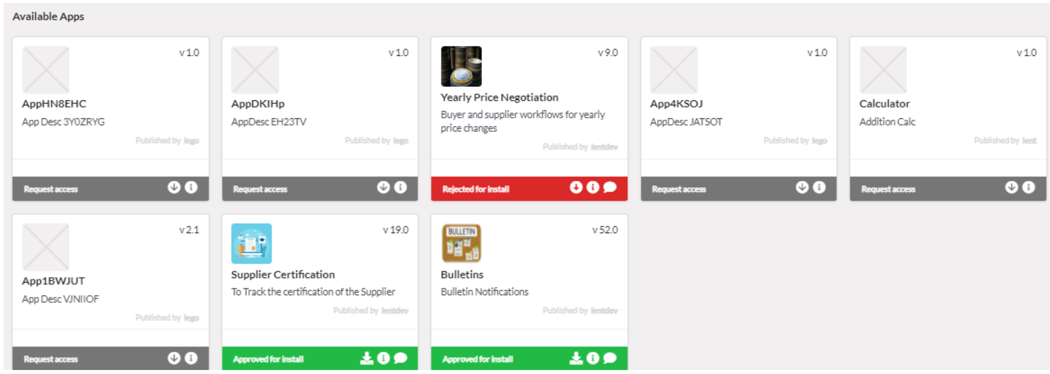
3. In the Marketplace, you will be able to view the following:
   - **Installed Apps**
     In this section, you will be able to view and manage all the apps that you have currently installed.



     Click on the **info** button to view more details of the app.

   - **Available Apps**
     In this section, you can view all the applications that are published by different

tenants. As the Buyer Administrator, you will be able to:

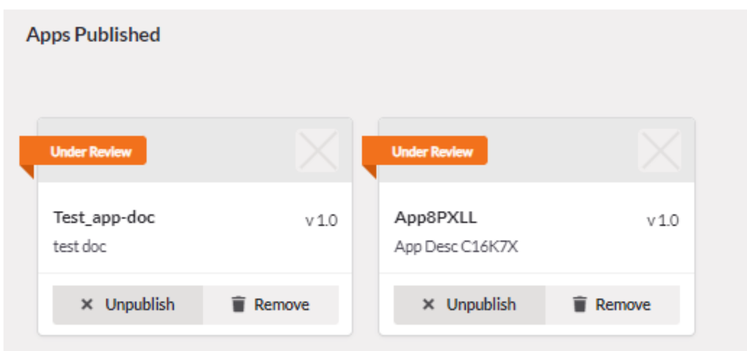


- **Request Access:** Click on the  button to request access to an app. On apps for which access has already been requested, you will see the *'Access Requested'* label instead of the button.

- **View App Info:** Click on the  to view information about the selected application.

- **Apps Published**

  To view your published apps, click on the **Apps Published** button on the top right corner of the Marketplace screen.



In this section, you can view:

- **App Approval Status:** A label across each app tile will display the current approval status (*Under Review, Approved,* and *Rejected*) of the application.
- **Application Details:** On each tile you will be able to see the app's name, version and description.
- **Publish:** Publishing an app will make the selected app visible in the marketplace.
- **Unpublish:** Unpublishing an app will hide the selected app from the marketplace.

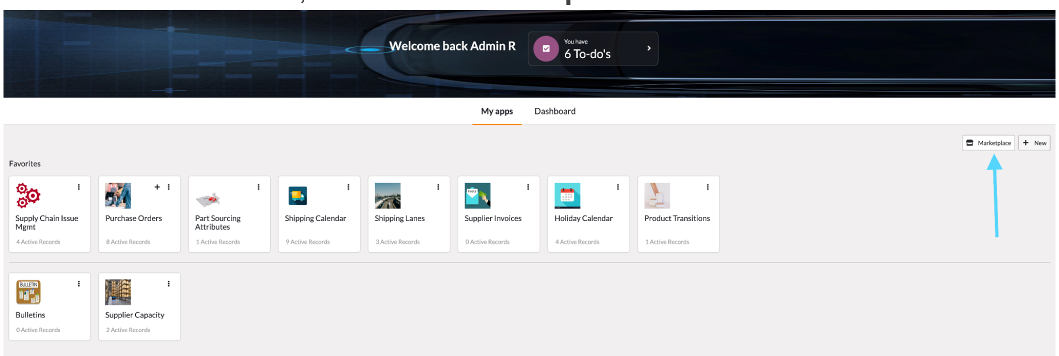
- **Remove:** Clicking on Remove on an application tile will delete the app from the marketplace.

Install Applications from the Marketplace

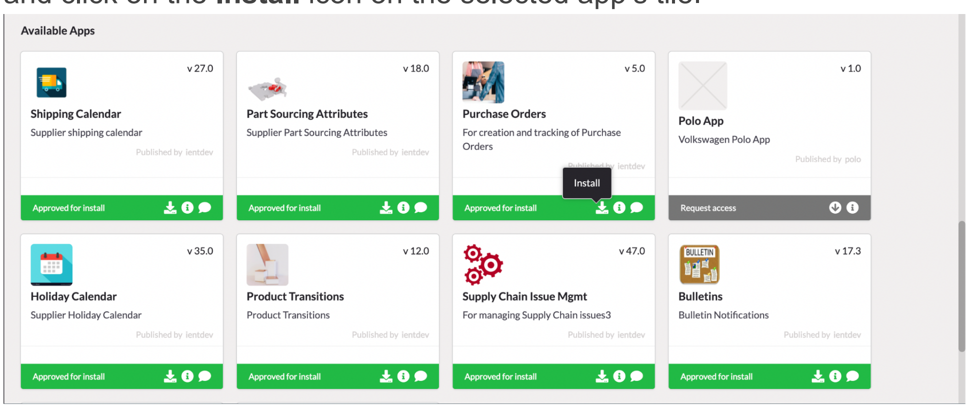
Note: *In order to install apps from the marketplace, you will need to request access to the app from the publisher of the selected app. See App Install Requests, for more information.*

To install an app from the marketplace:

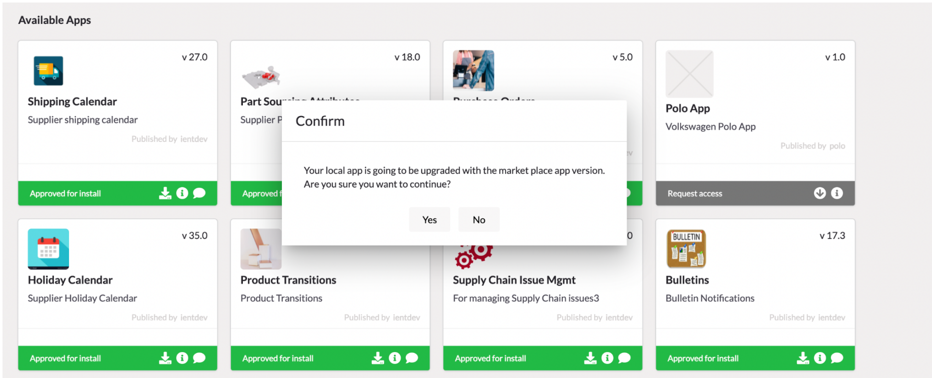
1. Login to the iENT Application
2. From the home screen, click on the **Marketplace** button.



3. Under available apps, ensure that the app you want to install is **Approved for install** and click on the **Install** icon on the selected app's tile.



4. Click on Yes to confirm installation.

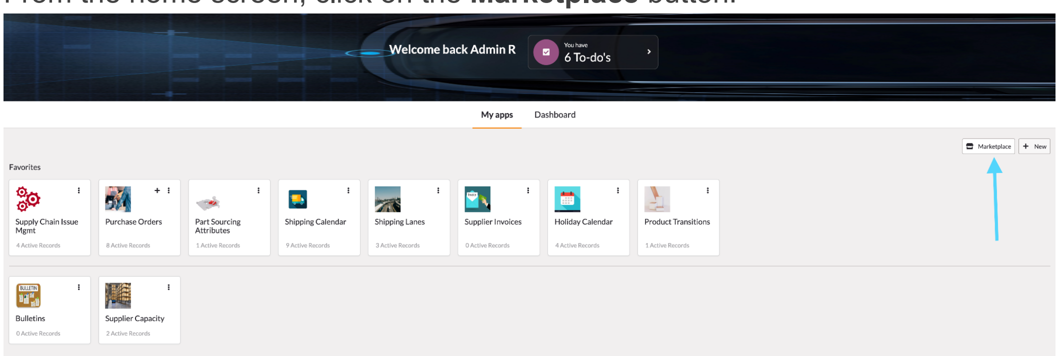


Publish Applications to the Marketplace

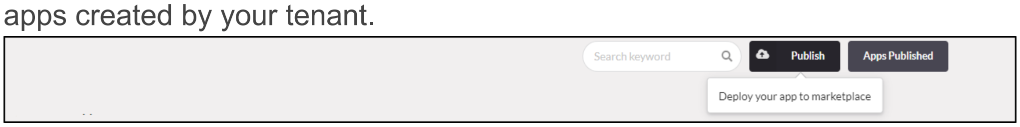
On the iENT Application, you can publish your own apps to the Marketplace either through the app builder or by uploading your own file. The apps will become available in the Marketplace for installation once Super Administrator approves the same.

To publish an app to the marketplace:

1. Login to the iENT Application.
2. From the home screen, click on the **Marketplace** button.



3. In the Marketplace page, click on the **Publish** button. You will only be able to publish apps created by your tenant.



4. You will now be able to upload an rjson file from your system onto the application.
5. When you **confirm** your upload, the application will be sent for approval after which it will be visible in the marketplace.

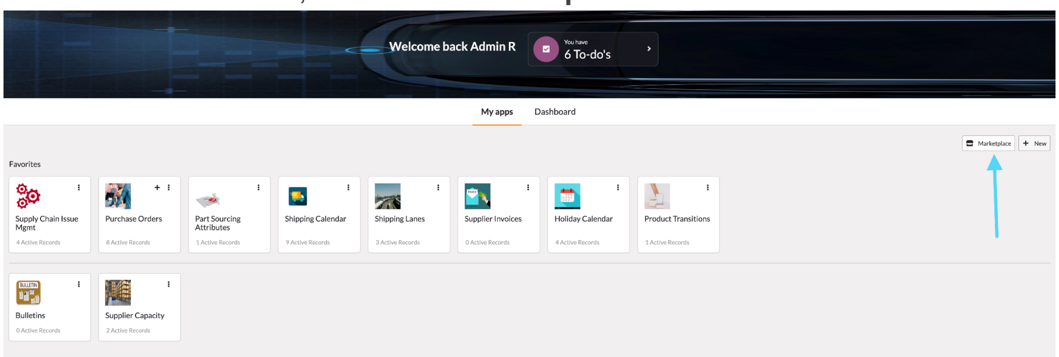
App Install Requests

To install an application from the marketplace, you will first need to request access to the selected app. The publisher of the application will have to approve this request before you are able to upgrade your local app with the marketplace application.

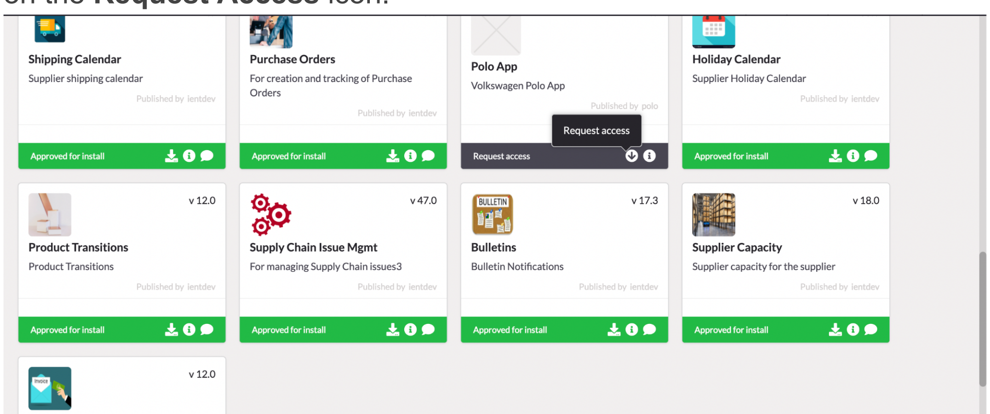
Request Access to Marketplace Applications

To request access to marketplace applications:

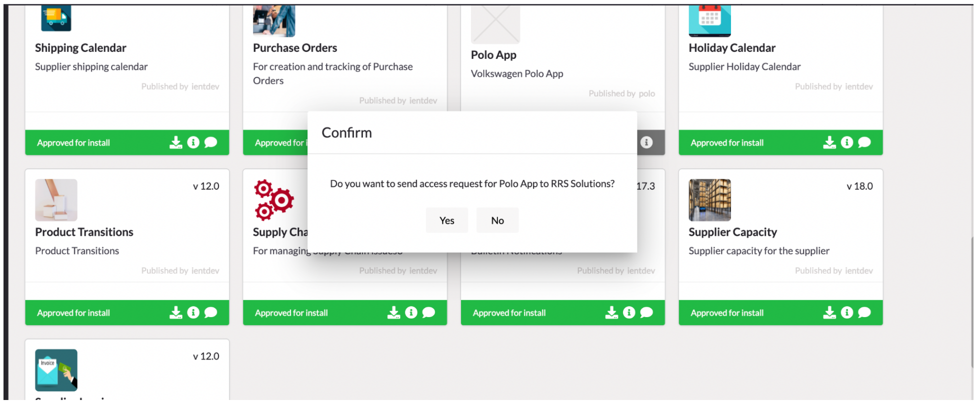
1. Login to the iENT Application
2. From the home screen, click on the **Marketplace** button.



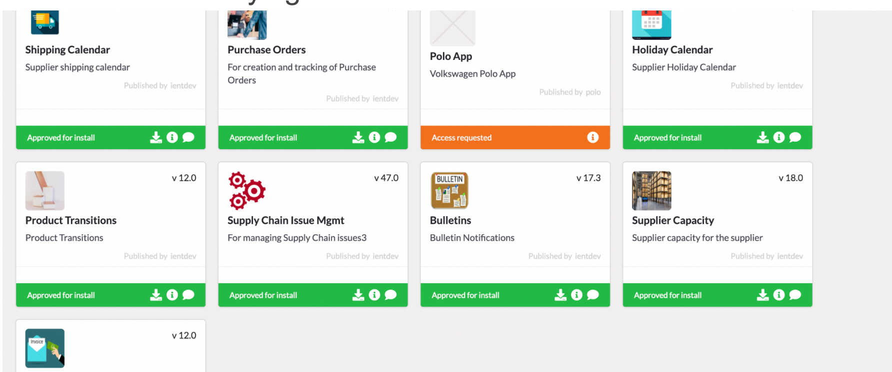
3. Under available apps, select the tile of the app you want to request access to, and click on the **Request Access** icon.



4. Click on **Yes** to confirm the request.



5. Once the installation request has been successfully sent, the tile of the selected app will have a label conveying the same.

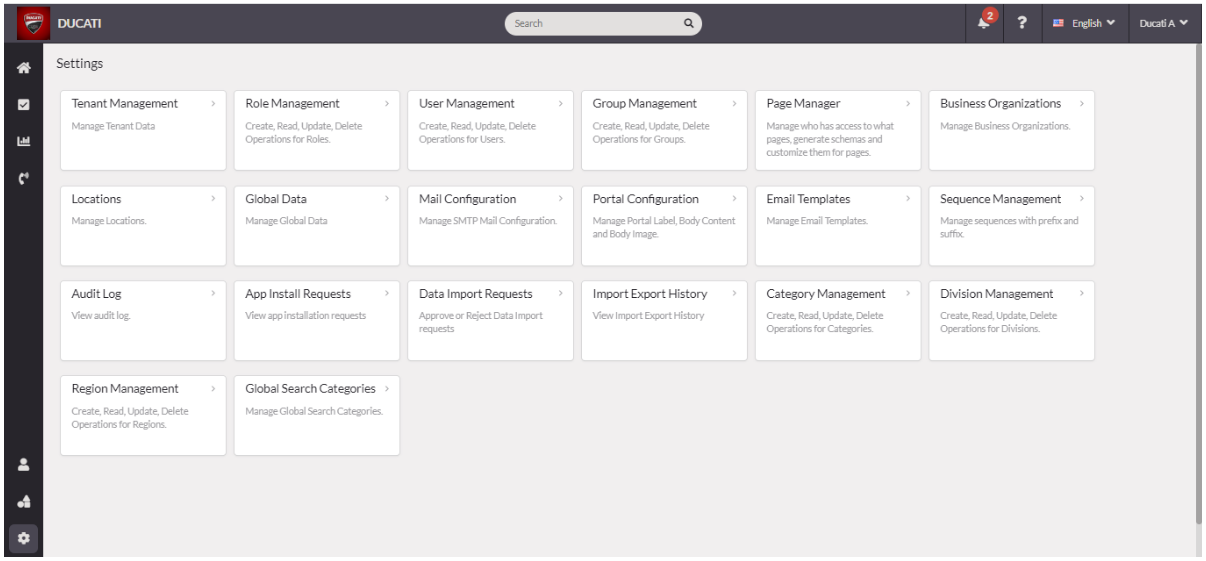


View the Approve, Reject and Review App Install Requests

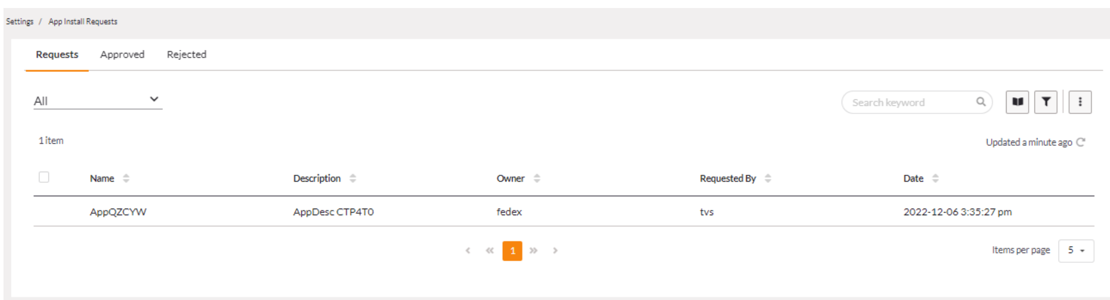
When a user requests access for installation of an application that you or other Buyer Administrator has published onto the marketplace, these are sent to iENT Super Admin for approval. You can view all the requests that pending for approval, approved, or rejected.

To review all your app install requests:

1. Login to the iENT application.
2. Go to **Settings > App Install Requests.**

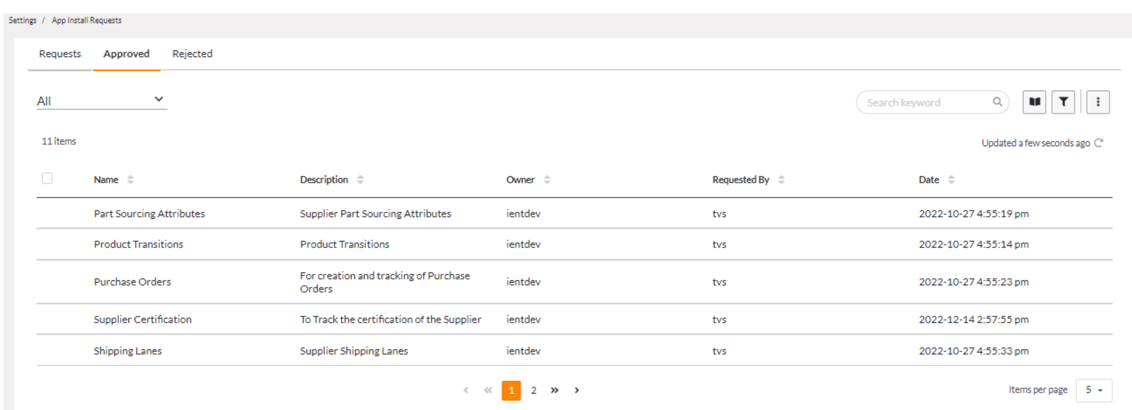


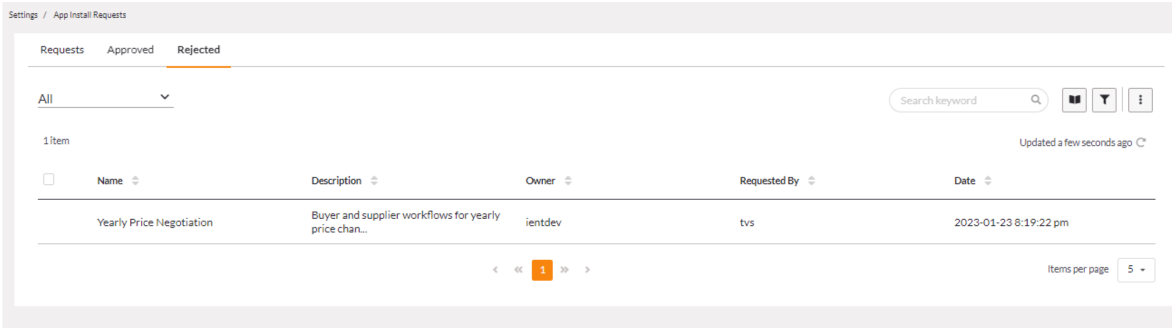
This will open all the application **Requests** with the following details that are pending for approval:



- Name
- Description
- Owner
- Requested By
- Date

3. Click on **Approved** or **Rejected** tabs to view all application requests that are approved or rejected, respectively.





4. You can click on the kebab menu to download the Requests, Approved or Rejected apps list.
   See *here* to explore how you can search, view, sort, and filter all the displayed records.

Bulletin Subscriptions

In order to empower customers to utilize the portal's capabilities in the most efficient and optimal manner, iENT offers the users with Bulletin Manager and Bulletin Approver roles to create and publish the bulletins across their organization. iENT offers the capability to publish the bulletins only to partners (suppliers) or to all subscribers. Subscribers of bulletins can be from both the tenant organization and their partners (suppliers). All users of iENT applications have the option to subscribe to bulletins as per their requirement.

This section describes the following tasks/features.

- **Subscribing to bulletins**
- **Prerequisites to bulletin creation**
- **Bulletin Creation**
- **Bulletin Approval**
- **Bulletin Reports**

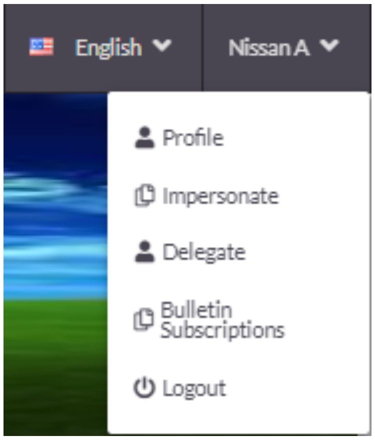
As an Org Admin (Buyer Admin), you have the ability to maintain the data required for bulletin creation. User with Bulletin Manager role is the creator of bulletins and users with Bulletin Approver role is the approver of bulletins. Buyer Admin can only create and approve the bulletins if those roles are provided by the tenant organization to the Buyer Admin. Additionally, both Bulletin Manager and Bulletin Approver roles are provided with the ability to check which users have viewed the published bulletins and also generated report based on attributes, such as date, bulletin type and category.

Subscribing Bulletins

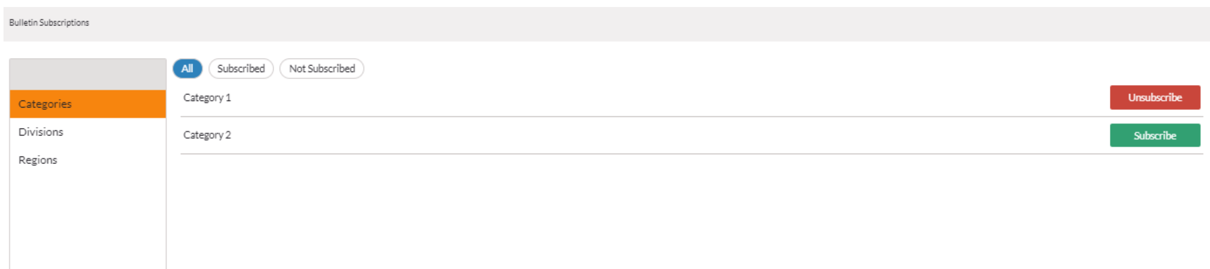
The iENT Application allows all users to subscribe to bulletins based on categories, divisions and regions. This section describes how you can subscribe or unsubscribe from bulletin subscriptions.

To do this:

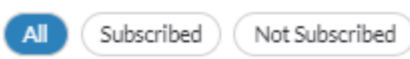
1. Log in to the iENT Application.
2. Click on your username on the top right corner of the screen and select **Bulletin Subscriptions** from the dropdown.



3. The **Bulletin Subscriptions** screen is displayed.



   By default, **Categories** subscription options are opened.
4. Click **Subscribe** against the category which you want to subscribe.
5. Click **Unsubscribe** against the category which you want to unsubscribe (if already subscribed).
6. You can use the **All**, **Subscribed** and **Not subscribed** options to filter the list of subscribed/unsubscribed bulletins.



7. Click **Divisions** and **Regions** options on the left pane to subscribe/unsubscribe to these bulletins.

Note: User is required to subscribe at least one option each from **Categories**, **Divisions** and **Regions** options. Based on the options selected, they will get the bulletins in the Bulletins app under **My Apps** option in iENT homescreen.

Prerequisites for Bulletin Creation

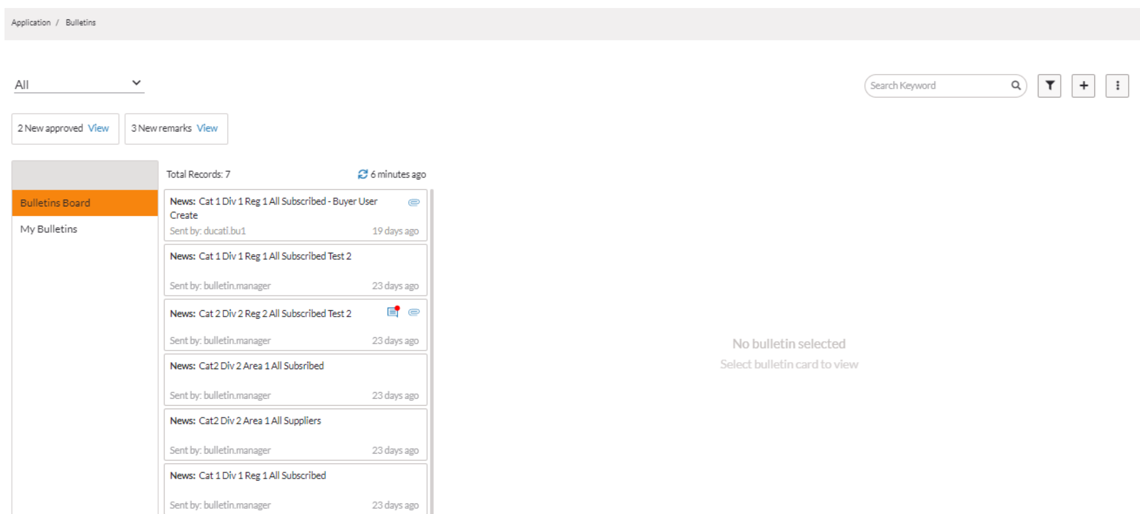
Buyer Admin has to create/maintain the records in **Category Management**, **Division Management** and **Region Management** modules related to bulletins before bulletins can be created. Refer to these modules how to create or modify the records in these modules.

Creating Bulletin

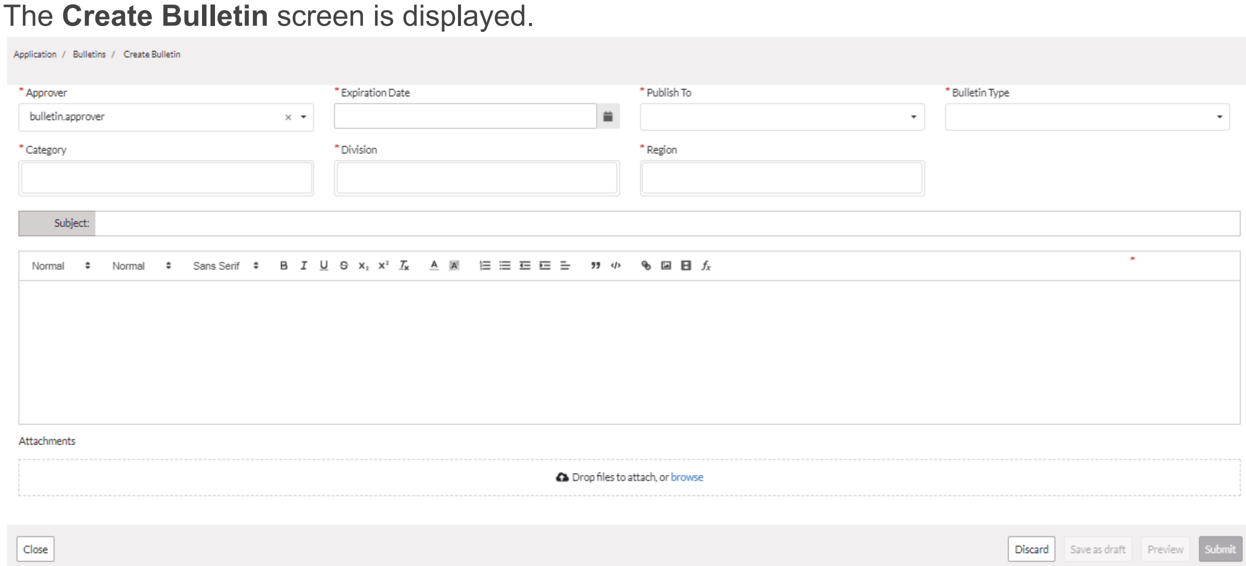
User with Bulletin Manager role can create bulletins. Bulletin Manager has the **Bulletins Board** option to view the published bulletins and also the **My Bulletins** option to manage the bulletins. The **Bulletins Board** also has the Filter option and Filter Management option to sort/filter the records displayed on the screen.

To create bulletins:

1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the **Bulletins** app.
   The **Bulletins** screen is displayed.



3. See *here* to explore how you can search, view, sort, and filter all the displayed records.
4. Click on the **+** button on the top right corner.
   The **Create Bulletin** screen is displayed.



5. Enter/select the following mandatory details of the bulletin:
    - **Approver:** From the dropdown list, select the user who will approve the bulletin being created.
    - **Expiration Date:** Select the date when the bulletin will expire after its publication.
    - **Publish To:** From the dropdown list, select the audience to which the bulletin will be published. Available options are:
        i. All Subscribed
        ii. All Suppliers (All Partners)
    - **Bulletin Type:** From the dropdown list, select the type of bulletin, such as News.
    - **Category:** Click the category field to view the available categories and select the applicable category for the bulletin. You can select multiple categories.
    - **Division:** Click the division field to view the available divisions and select the applicable division for the bulletin. You can select multiple divisions.
    - **Region:** Click the region field to view the available regions and select the applicable region for the bulletin. You can select multiple regions.
    - **Subject:** Enter a subject for the bulletin.
    - **Body:** Enter the information for the bulletin being created. You can insert image, link, and provide video link or formula in the body.
    - **Attachments** (optional)
6. Click **Preview** to preview the bulletin.
7. Click **Submit**.

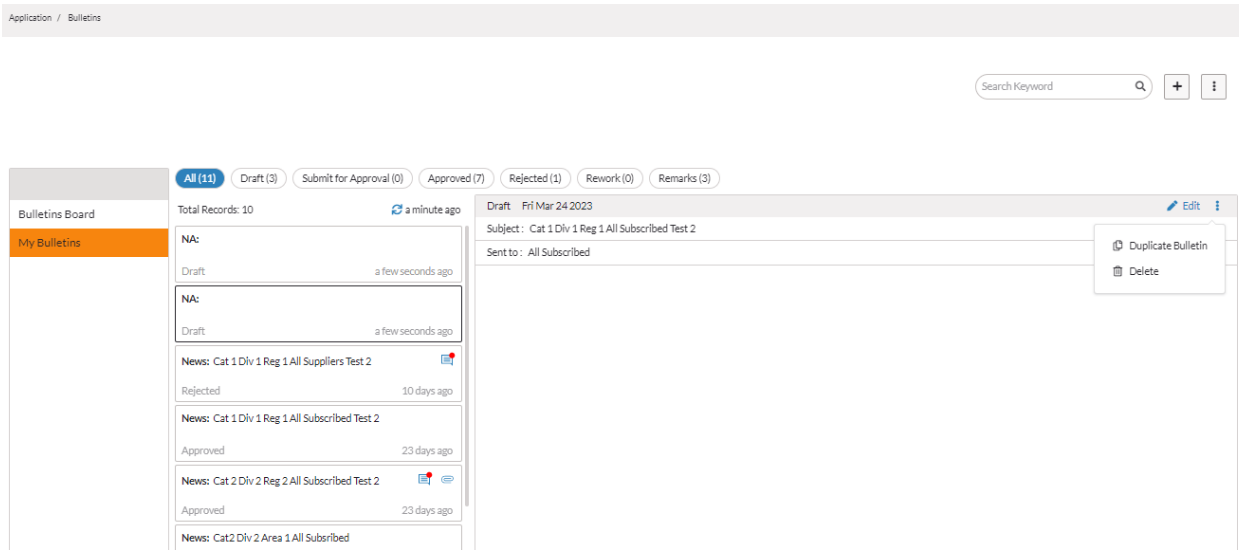
My Bulletins

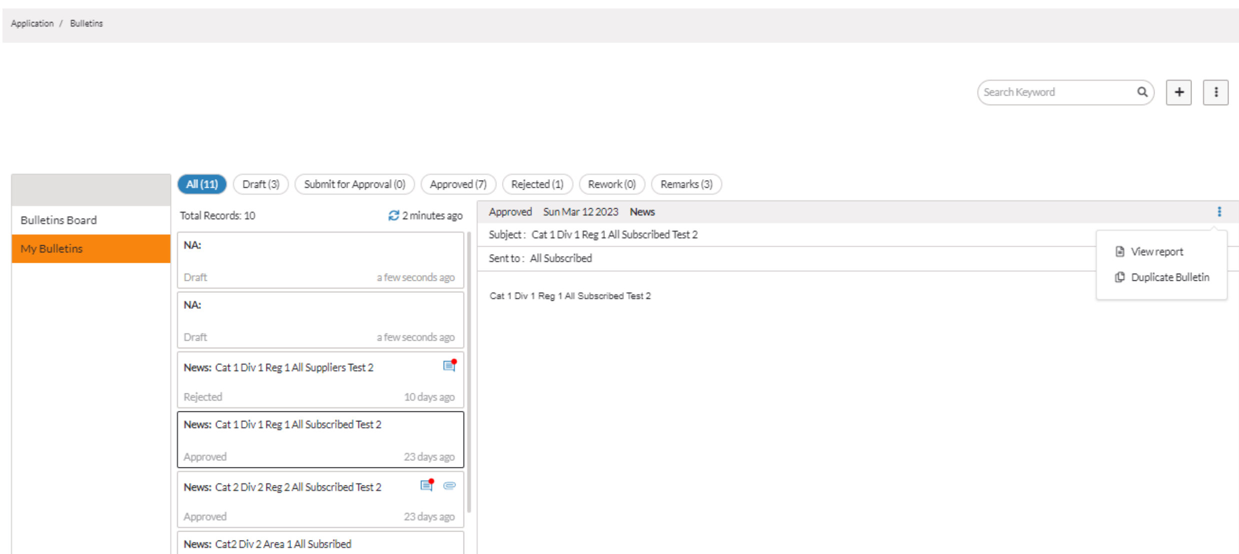
My Bulletins option allows the Bulletin Manager to view all the bulletins created, drafted, submitted for approval, or under rework. Filters to view the bulletin approved, rejected, under draft, need rework and with remarks are provided.

Only bulletins which are in draft stage can be deleted and edited. Edit option will also be available for bulletins that are sent back for rework from Bulletin Approver.

Bulletin Manager can create a new bulletin by duplicating any existing bulletin whether it is in draft stage or rejected. Any bulletin can be duplicated. When a bulletin is duplicated, all the existing data except **Expiration Date** is available for creating the new bulletin. Bulletin Manager can edit the data/options as required.

Click the kebab menu of any bulletin to access the **Delete** or **Duplicate Bulletins** options for that bulletin. The **View Report** option will be available only for the approved bulletins.





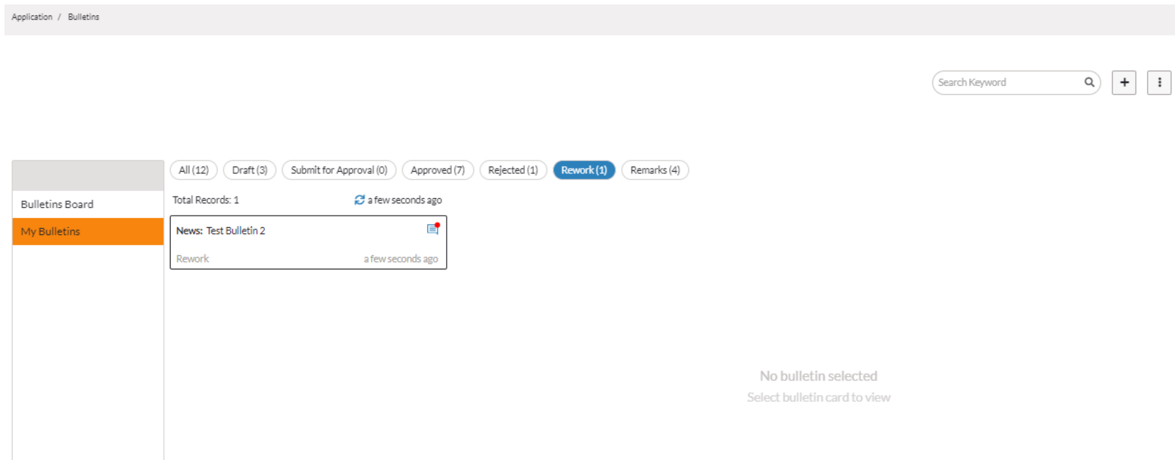
Note: The Filter and Filter Management options are not available for **My Bulletins** and only available for **Bulletins Board**.

Viewing Remarks and Reworking Bulletin

When a bulletin is send back for rework, Bulletin Manager can view the remarks provided by the Bulletin Approver and respond to the remarks. These remarks are viewable only to the Bulletin Approver and Bulletin Manager.

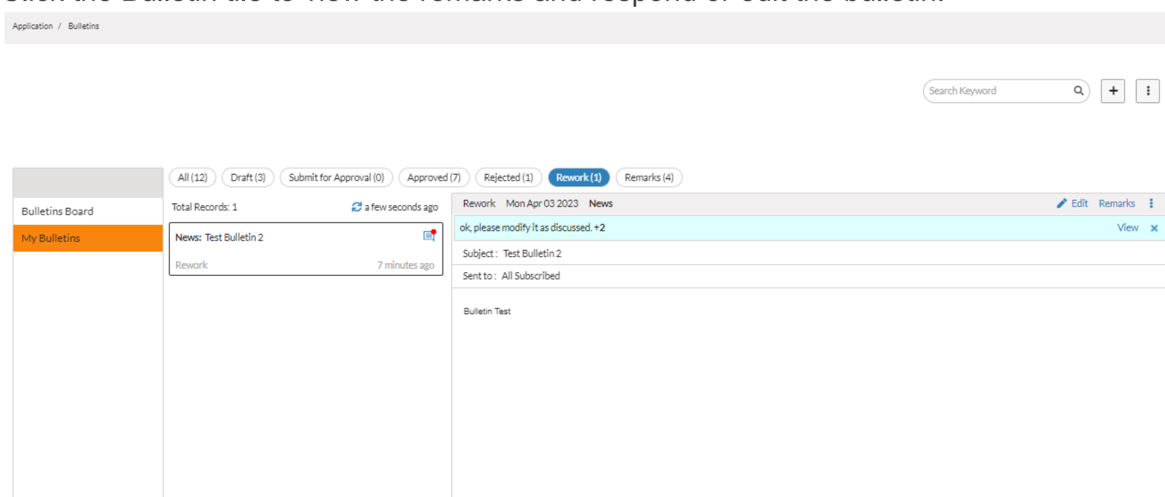
To do this:

1. On the **My Bulletins** dashboard.
2. Click the **Rework Filter** to view all the Bulletins that have been send back for rework.

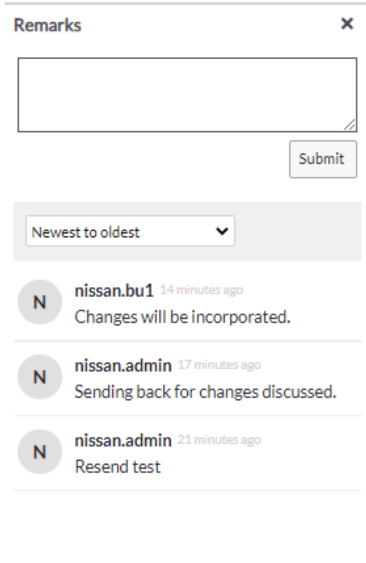


Note: The Filter and Filter Management options are not available for **My Bulletins** and only available for **Bulletins Board**.

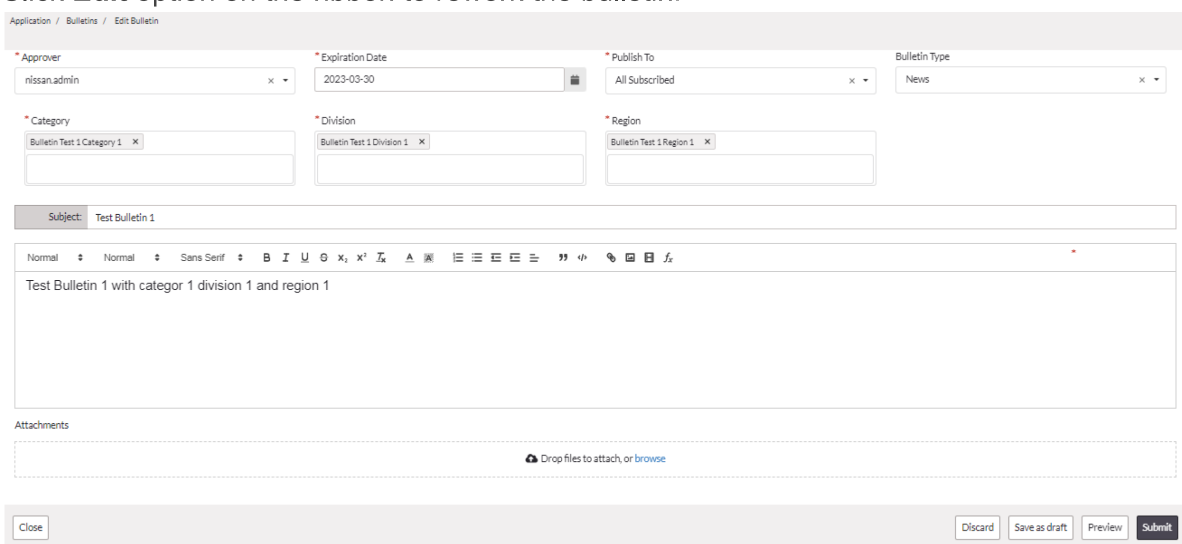
3. Click the Bulletin tile to view the remarks and respond or edit the bulletin.



4. Click the **Remarks** link on the ribbon to view the remarks. The ribbon also shows the latest remark and count of the other remarks.



5. You can provide your remarks and Click **Submit**.
6. Click **Edit** option on the ribbon to rework the bulletin.



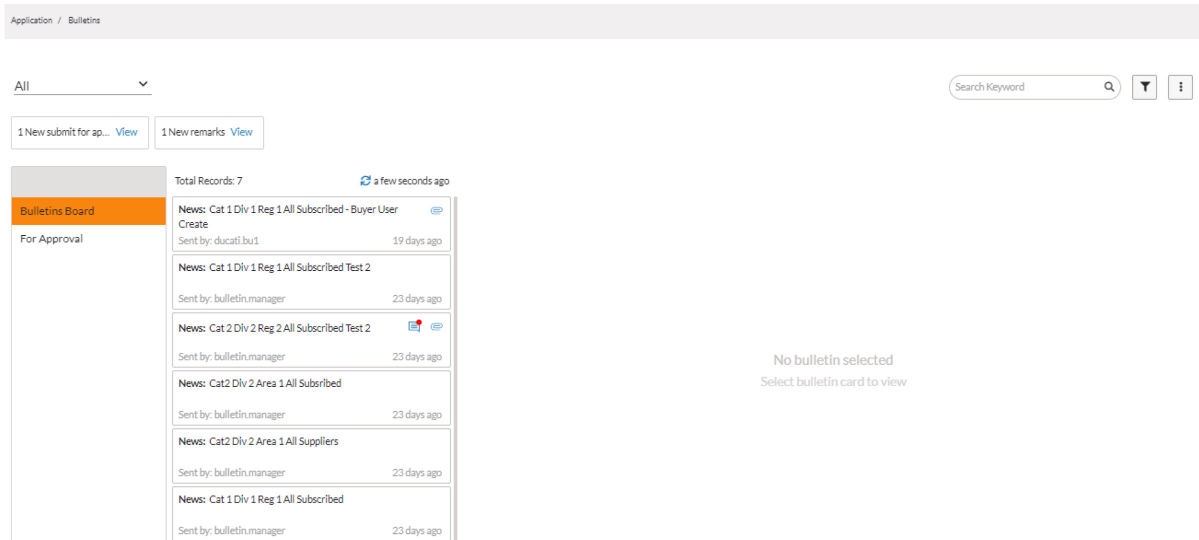
7. Edit the details as required.
8. Click **Preview** to preview the bulletin, if needed.
9. Click **Submit**.

Approving Bulletin

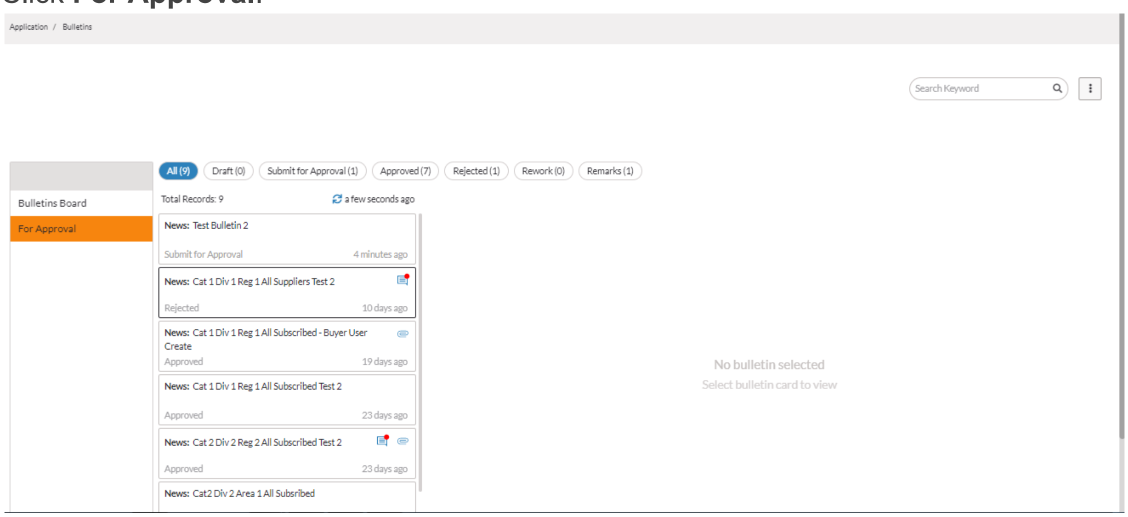
User with Bulletin Approver role can approve the bulletins which are submitted for approval. Bulletin Approver is provided with **Bulletins Board** and **For Approval** options. In the **Bulletins Board** user can view the published bulletins which the user has subscribed to. **For Approval** option allows the Bulletin Approver to approve or reject the bulletin or send the bulletin back for rework with remarks. The remarks can be initiated by Bulletin Approver and can be responded by the Bulletin Manager. These remarks are viewable only to the Bulletin Approver and Bulletin Manager.

To approve bulletins:

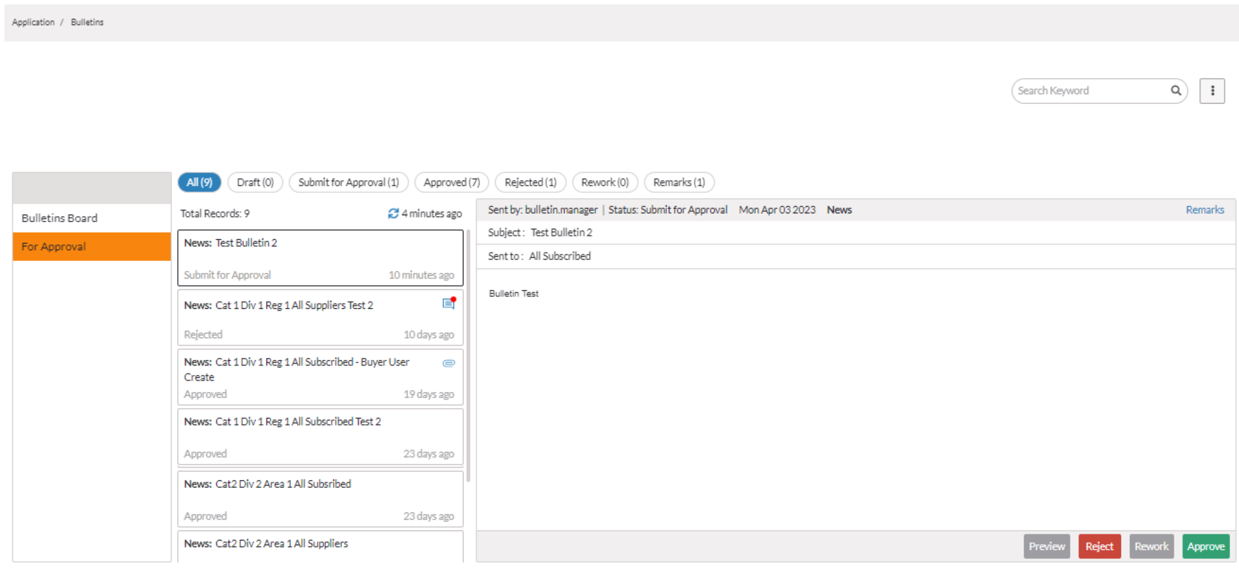
1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the Bulletins App.
   The **Bulletins** screen is displayed.



3. See *here* to explore how you can search, view, sort, and filter all the displayed records.
4. Click **For Approval**.

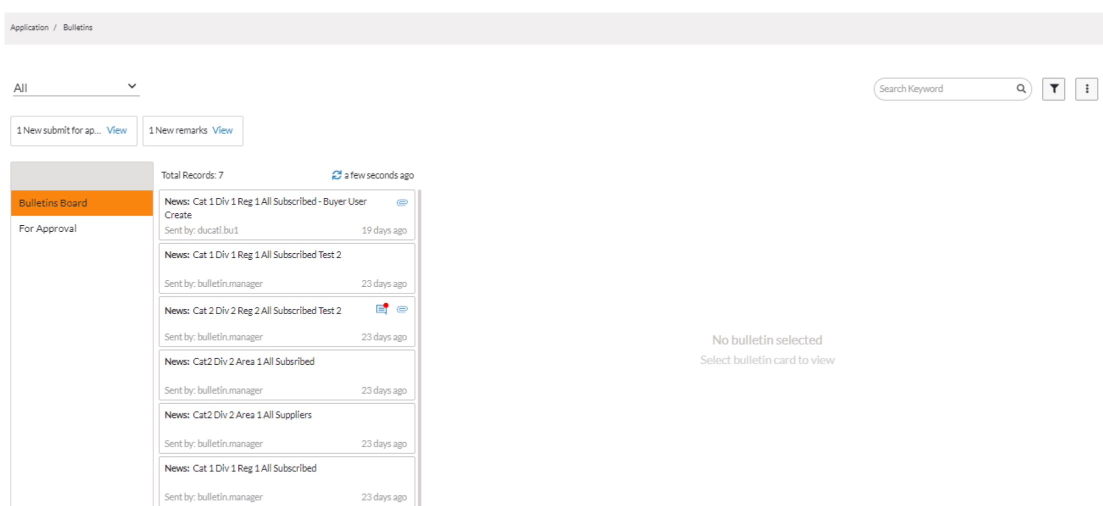


   Bulletin Approver can view all the requests sent for approval. Filters are provided to view the bulletins based on status such as approved, rejected, or rework.
   Note: The Filter and Filter Management options are not available for **For Approval** and only available for **Bulletins Board**.
5. Click the bulletin that you want to approve or reject or send back for rework.



6. Review the bulletin and take any of the following actions as required:
   - Click **Reject**, provide the rejection remarks and then click **Reject Bulletin**.
   - Click **Rework**, provide the remarks for rework and then click **Send to Rework**.
   - Click **Approve** and then click **Approve** on the confirmation message for publication.

7. Click **Bulletins Board** option.
   The published bulletin will be listed here, if your bulletin subscription matches to bulletin's publication criteria.



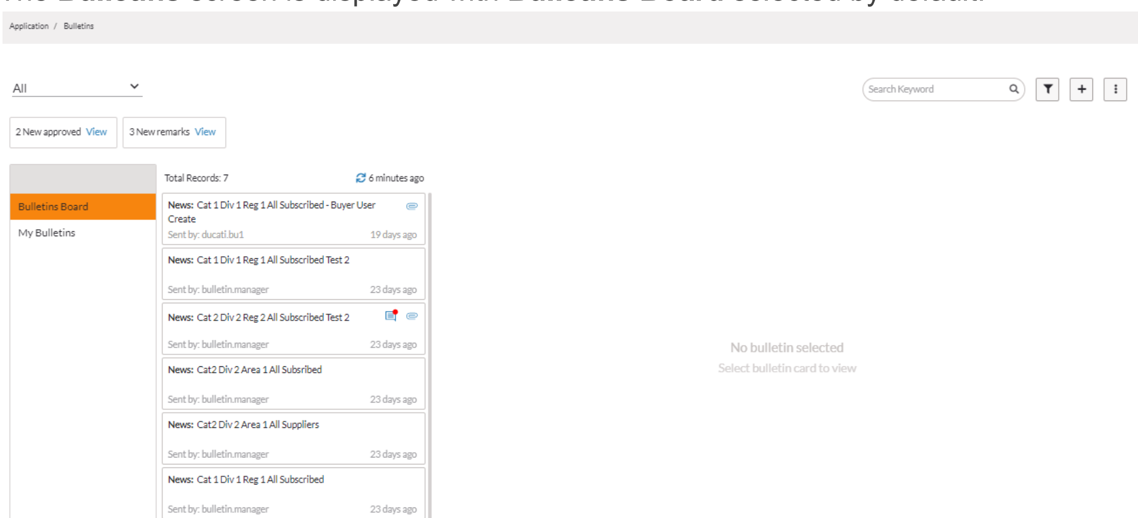
8. Click the Bulletin tile to view the bulletin.

Viewing and Generating Bulletins Report

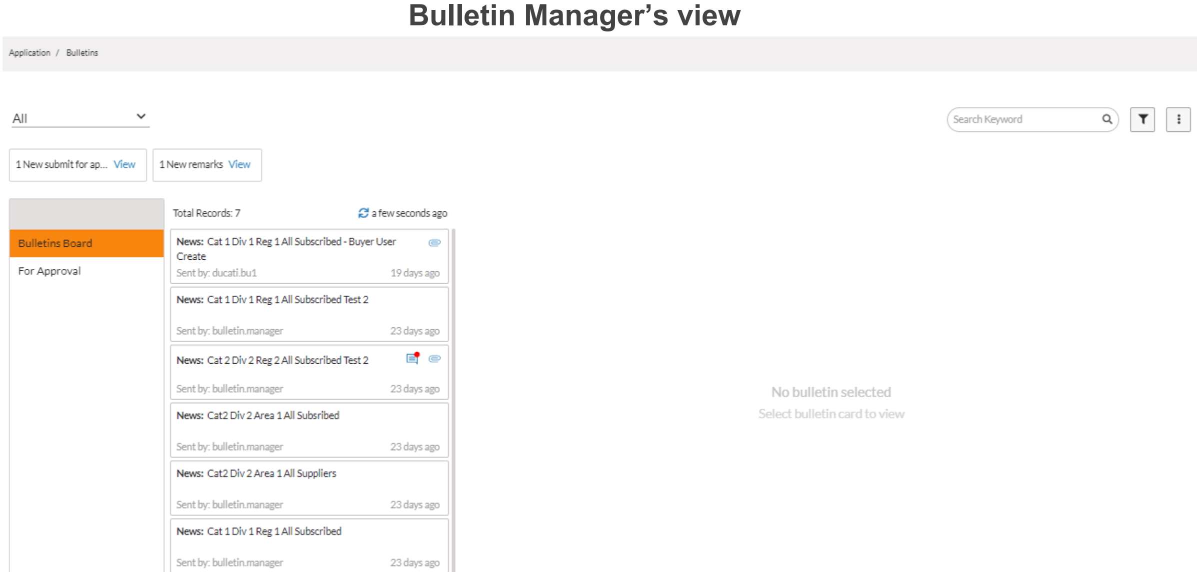
Users with Bulletin Manager or Bulletin Approver role can view number of users who viewed a particular published bulletin and also generate bulletins report based on attributes such as date, region and category.
In this section, we will describe how to view the statistics related to a particular published bulletin and how to generate the bulletins report.

To view a published bulletin's statistics:

1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the **Bulletins** App.
   The **Bulletins** screen is displayed with **Bulletins Board** selected by default.

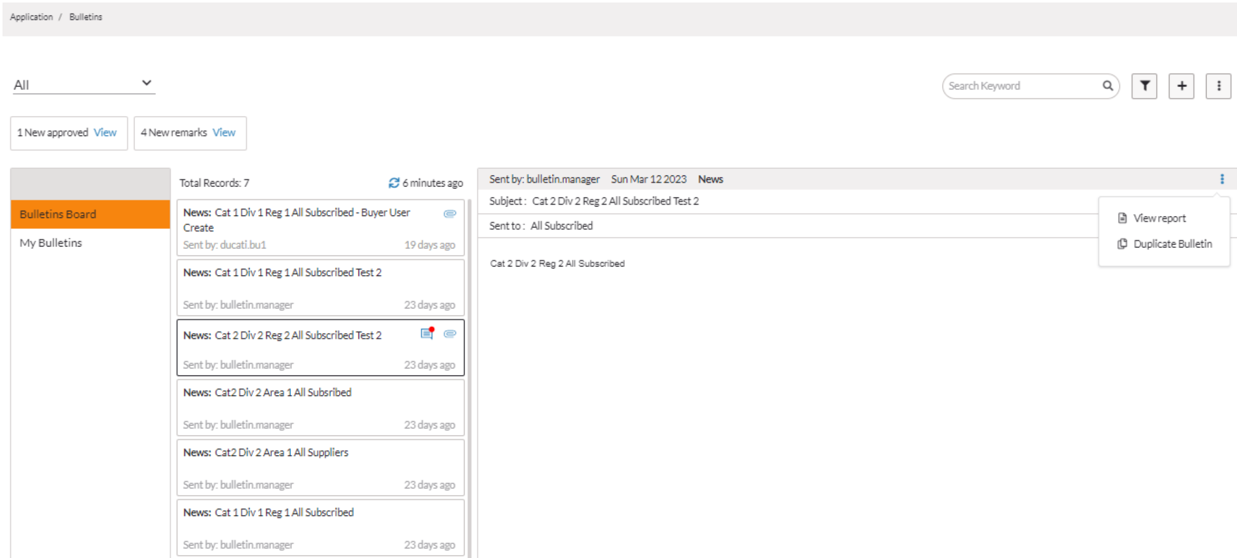


Bulletin Manager's view

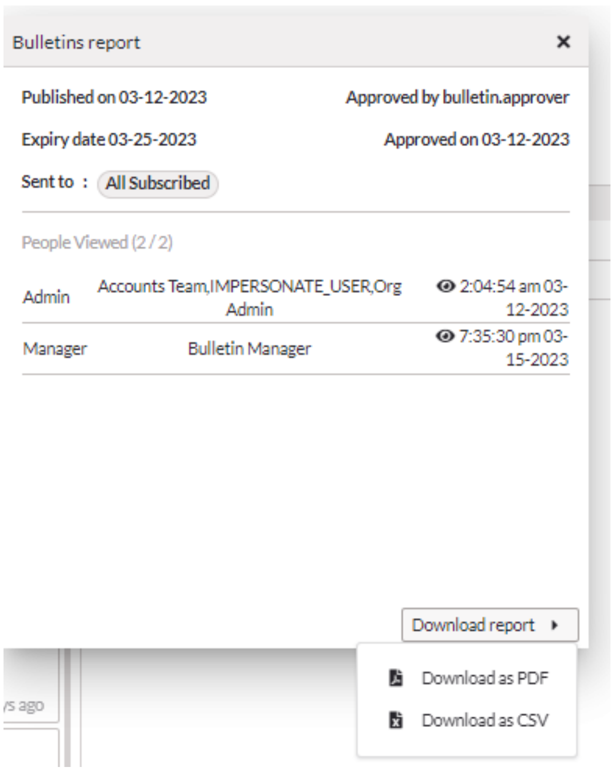


Bulletin Approver's view

3. See *here* to explore how you can search, view, sort, and filter all the displayed records.
4. Click the bulletin for which you want to view the statistics.



5. From the kebab menu for the particular bulletin, click **View report**.



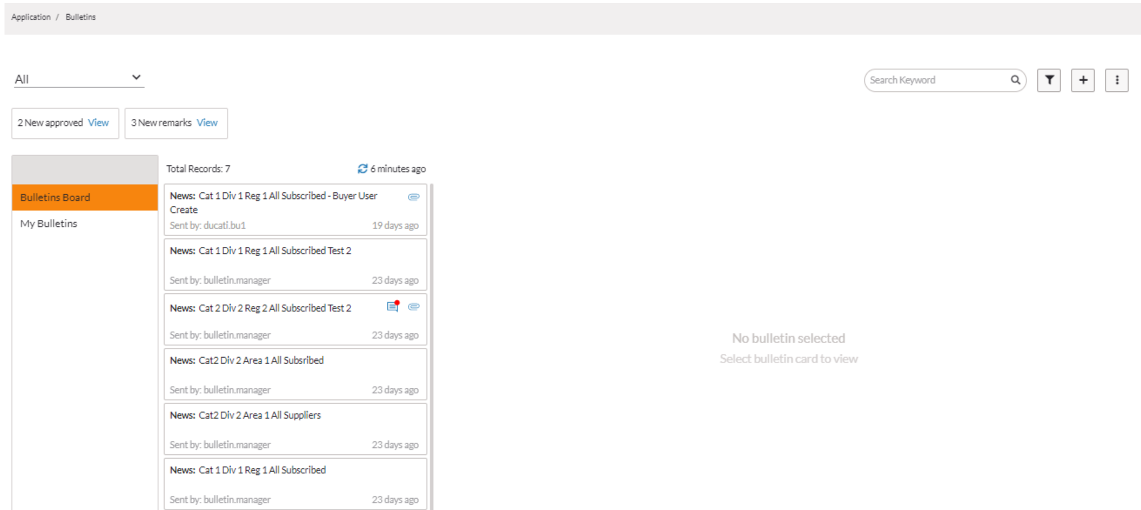
The **Bulletins report** for the particular bulletin is displayed. It displays the total number of users who viewed the published bulletin, bulletin's publication date, expiry date and approval details.

6. Click **Download report** to download the report in the required format.

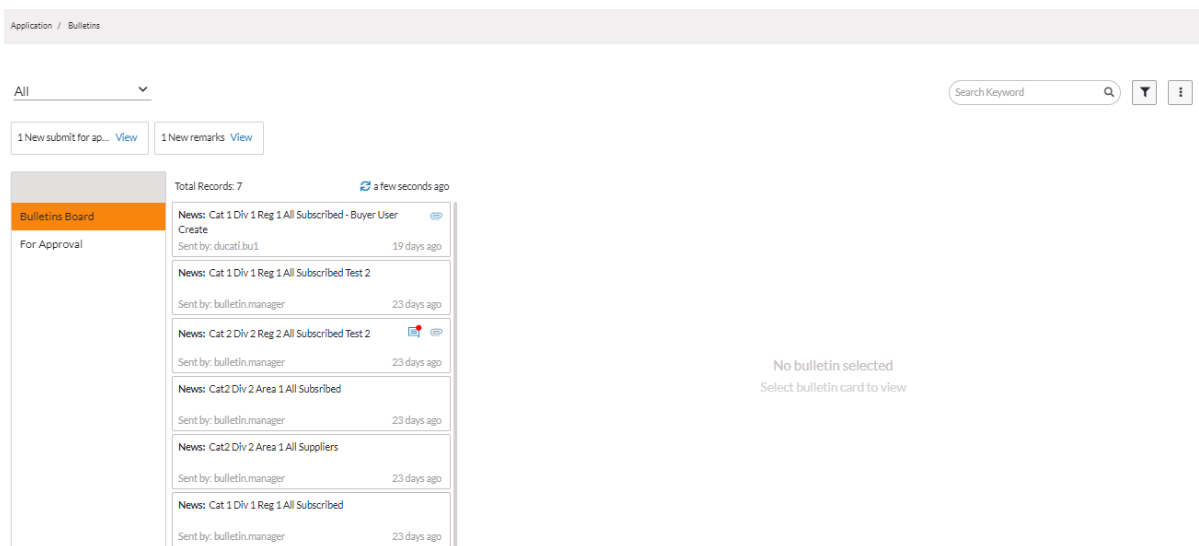
To generate bulletin reports based on multiple attributes:

1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the **Bulletins** App.

The **Bulletins** screen is displayed with **Bulletins Board** selected by default.



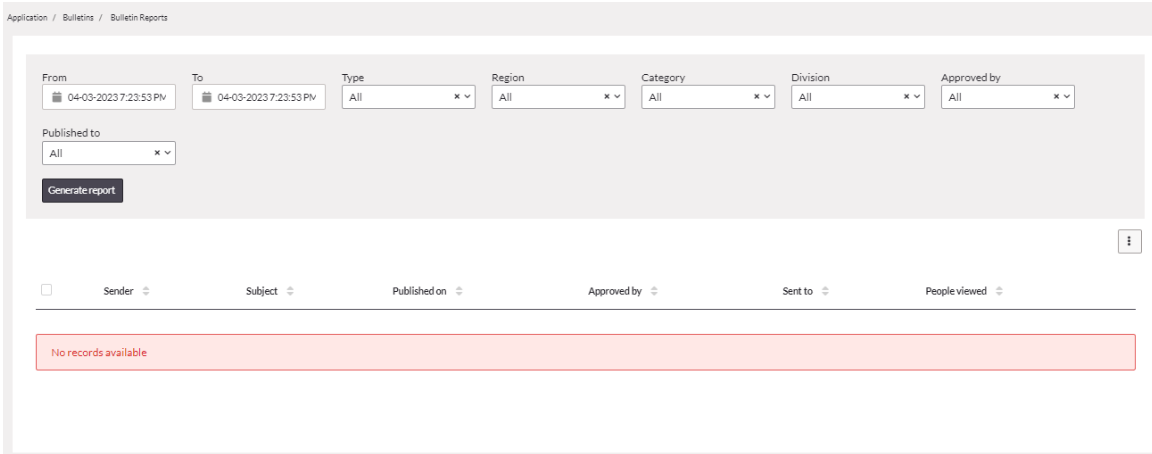
Bulletin Manager's view



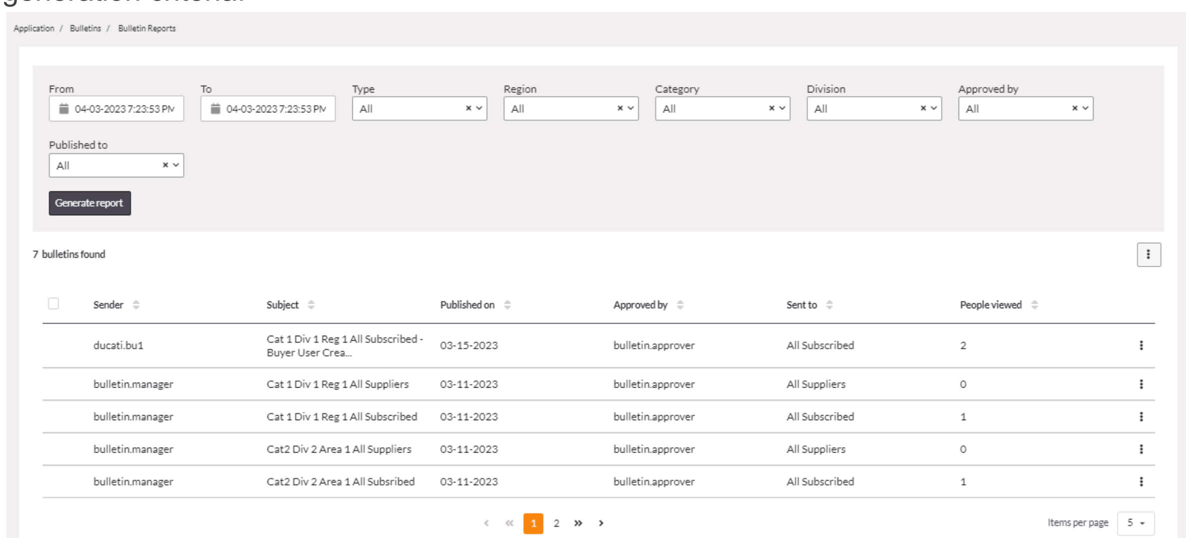
Bulletin Approver's view

3. See *here* to explore how you can search, view, sort, and filter all the displayed records.
4. Click the kebab menu on the top right corner of the screen and click **Bulletins Report**.

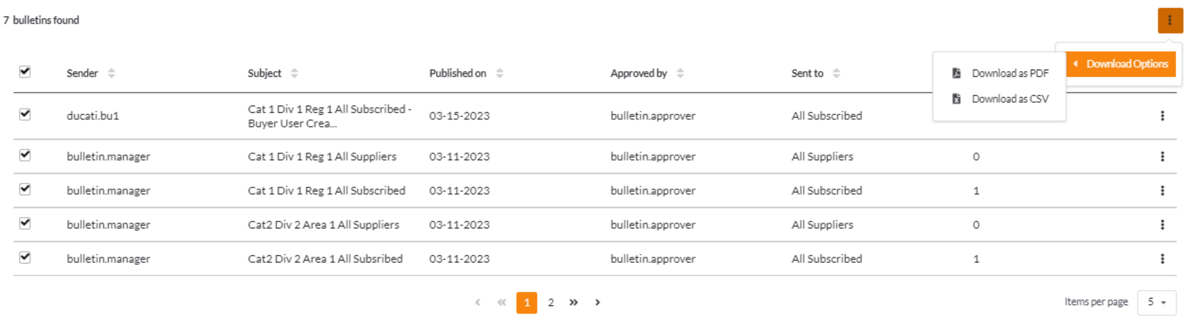
The **Bulletin Reports** screen is displayed.



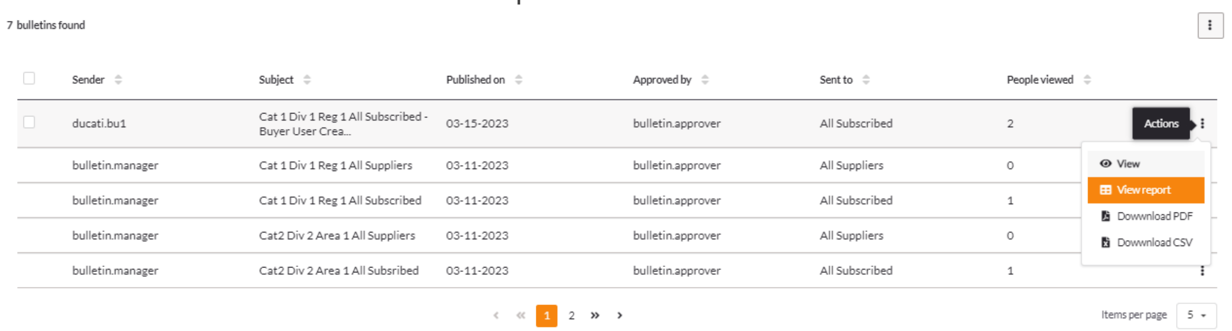
5. Select the date range, type, region and other options based on which you want to generate the bulletins report.
6. Click **Generate report**.
   The **Bulletin Reports** screen is displayed along with the bulletins which match report generation criteria.



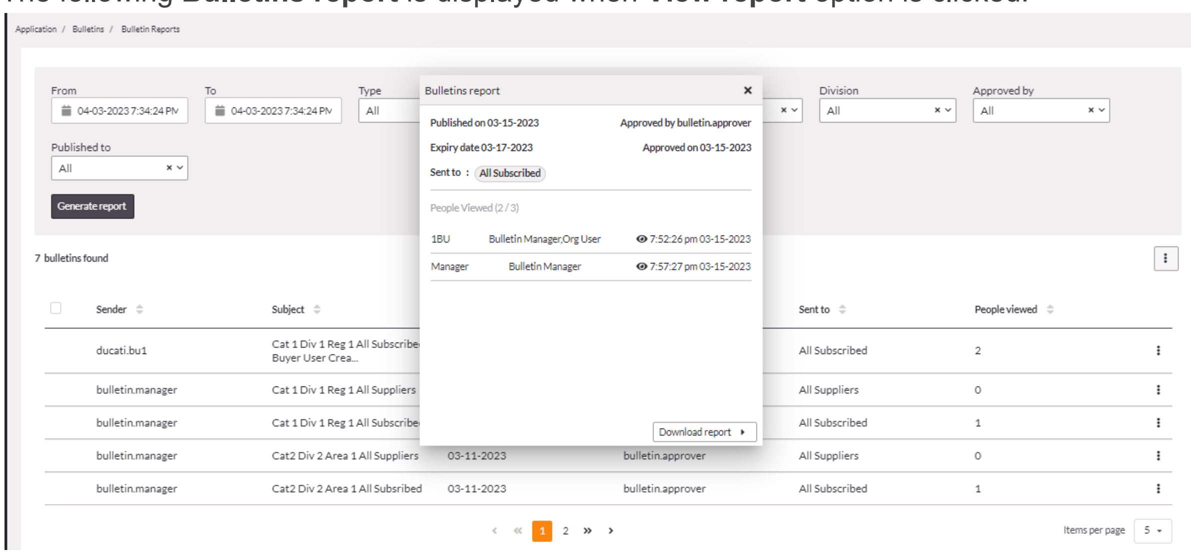
7. The report displays the following details for the bulletins:
   - Sender
   - Subject
   - Published on
   - Approved by
   - Sent to
   - People Viewed
8. You can download list of all the reports or the selected reports by clicking the kebab menu above the reports and click **Download Options** and select the PDF or CSV option as required.



9. You can also view and download report for a particular bulletin. To do so, click the kebab menu against the particular report and click **View report** to view the report or **Download PDF/Download CSV** to download the report.



The following **Bulletins report** is displayed when **View report** option is clicked.



10. You can also download this report from this screen. Click **Download report** to download it.

Demand Change App

iENT offers the users with Org User roles to create demand change case/task of a part. While creating the demand change case, the user will be able to see any sub-parts and corresponding partners (suppliers) associated with the part. Once the demand change task is created, all the associated partners (suppliers) will be notified through emails. The Org User will also get an email notification once the task is created. Once the task is created, the user who is the initiator of the task becomes the owner of the task and can view the response of all the suppliers. Once all the partner(s) responses are approved by their corresponding Partner Admin user (earlier Partner Admin used to be referred as Supplier Admin and Partner User as Supplier User), the Org User can approve or reject the responses submitted and can close the task or send it back for rework.

In this section, we will cover the following tasks:

- **Prerequisites for demand change request**
- **Create demand change request**
- **View response of suppliers**
- **Approve/Reject/Rework action for the Demand Change responses**

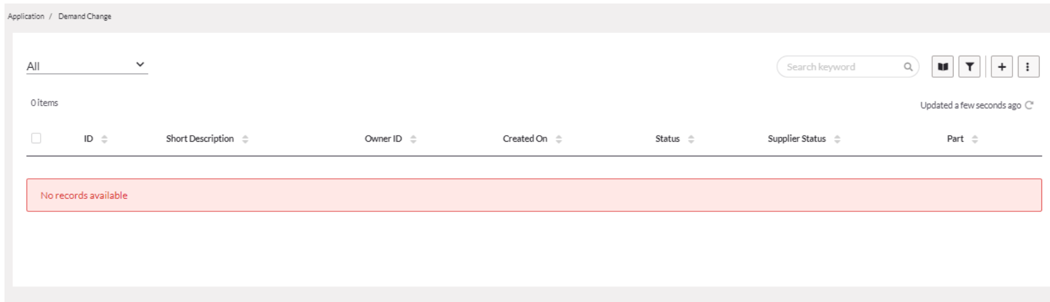
Prerequisites for Demand Change Request

As an Org Admin (Buyer Admin), you can create the demand change request for parts if Org User role is assigned to you by your organization. During demand change task creation, you will be required to select data for parts, partners (suppliers) and locations, so maintain/create the required data in the corresponding modules else the demand request will not be created.

Creating Demand Change Request

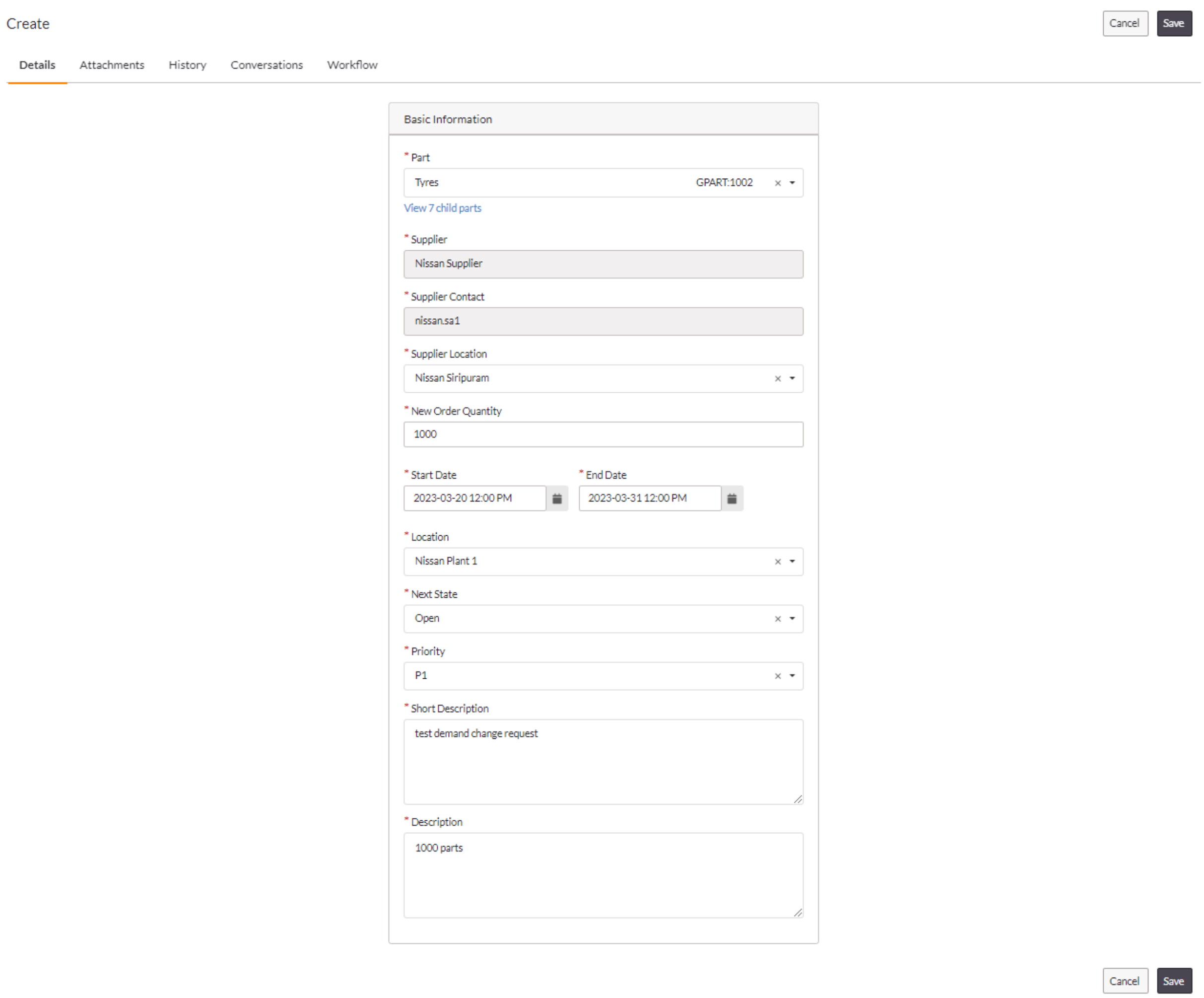
To create a demand change of part:

1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the **Demand Change** app.
   The **Demand Change** screen is displayed.



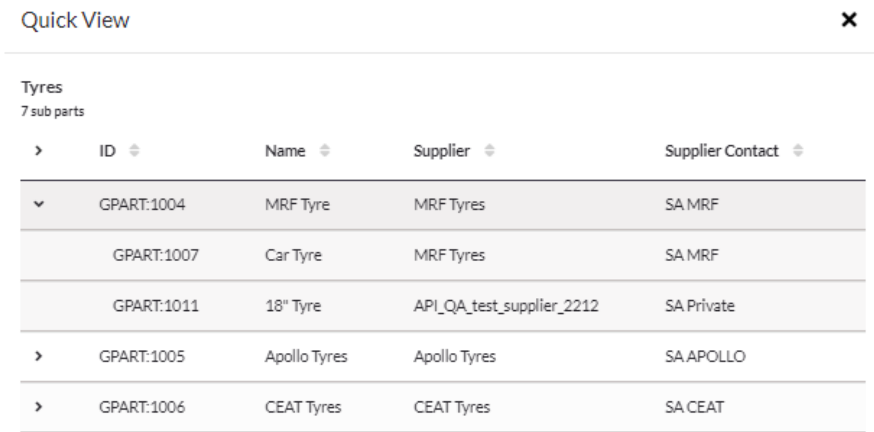
All existing demand change tasks will be listed here.

3. Click on the **+** button on the top right corner.
   The **Demand Change Create** screen is displayed.



4. Enter/select the following mandatory details:
   - **Parts:** From the dropdown list, select the primary part for which you want to create the demand change request. Based on the part selected, you can view the **View x child parts** link. This link is displayed only if the selected main part has sub-parts. Clicking this link will show the all the sub-parts and their corresponding

child-parts, if any, along with their corresponding supplier details. Click the **>** button beside a parent part to view the child-part.


Quick View

Tyres
7 sub parts

>	ID	Name	Supplier	Supplier Contact
˅	GPART:1004	MRF Tyre	MRF Tyres	SA MRF
	GPART:1007	Car Tyre	MRF Tyres	SA MRF
	GPART:1011	18" Tyre	API_QA_test_supplier_2212	SA Private
>	GPART:1005	Apollo Tyres	Apollo Tyres	SA APOLLO
>	GPART:1006	CEAT Tyres	CEAT Tyres	SA CEAT

Note: If supplier contact and supplier location details are not maintained for the supplier associated with the selected part, the app will not allow the creation of demand change request.

- **Supplier:** The supplier associated with the part selected in the **Parts** field is displayed here.
- **Supplier Contact:** The Partner Admin associated with the supplier is displayed here. The Partner Admin user can be associated with only one supplier.
- **Supplier Location:** Displays the location of the supplier.
- **New Order Quantity:** Enter the quantity that needs to be delivered.
- **Start Date:** Select the start date of the period during which the parts need to be supplied.
- **End Date:** Select the end date of the period during which the parts need to be supplied.
- **Location:** From the dropdown list, select the location where the parts need to be delivered.
- **Next State:** From the dropdown list, select **Open** as the status of the request being created.
- **Priority:** From the dropdown list, select priority level for the task being created.
- **Short Description:** Enter a short description related to part/task.
- **Description:** Enter a description related to part/task.

5. Click **Save**.

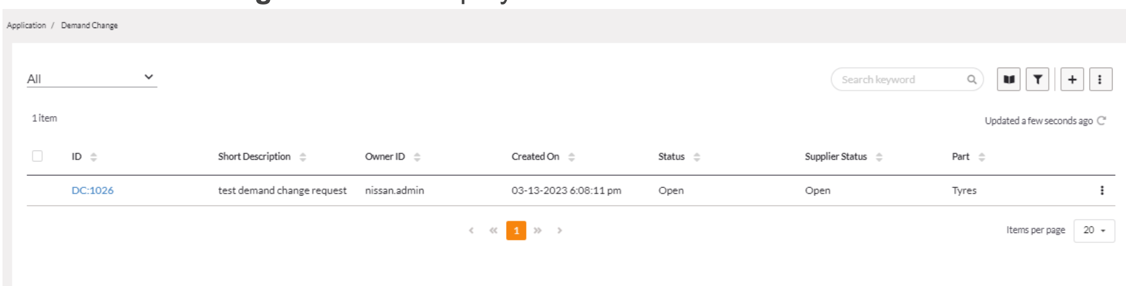
Note: You can click the attachment tab to attach files related to the request. Also, once the users start working on the task, you can view history and conversations in the **History** and **Conversations** tabs.

Viewing Demand Change Request Details

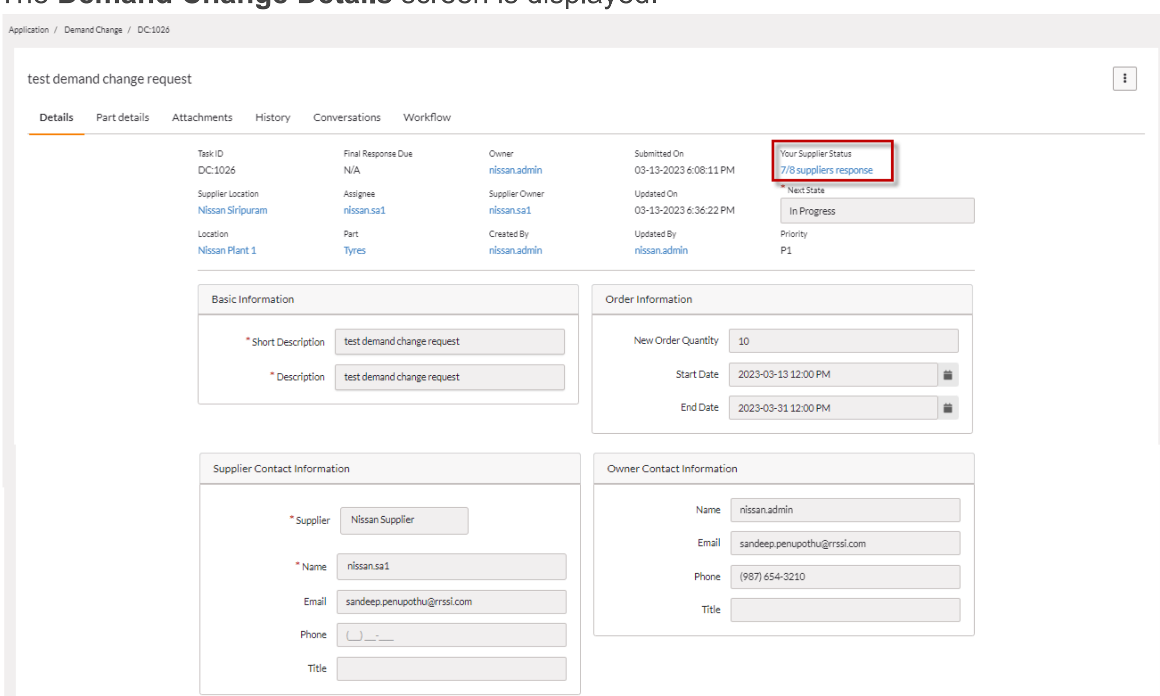
Once a demand change request for a part is created, the owner of the case/task can view the responses of all the associated suppliers along with their details.

To view the responses for the demand change request:

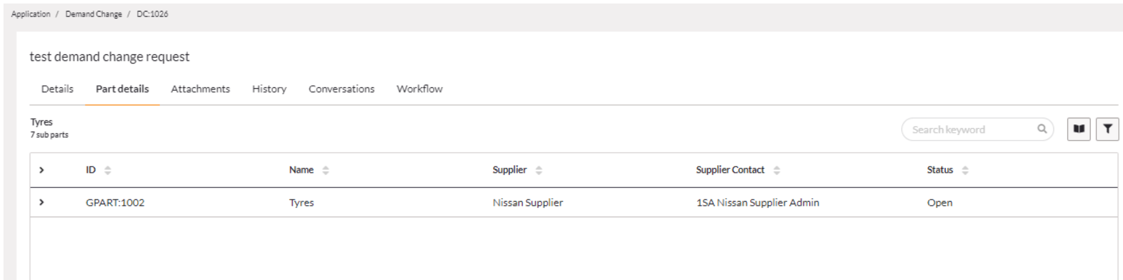
1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the **Demand Change** app.
   The **Demand Change** screen is displayed.



   All existing demand change tasks/requests will be listed here.
3. Click the **ID** link of the demand change request for which you want to view the responses and part details.
   The **Demand Change Details** screen is displayed.

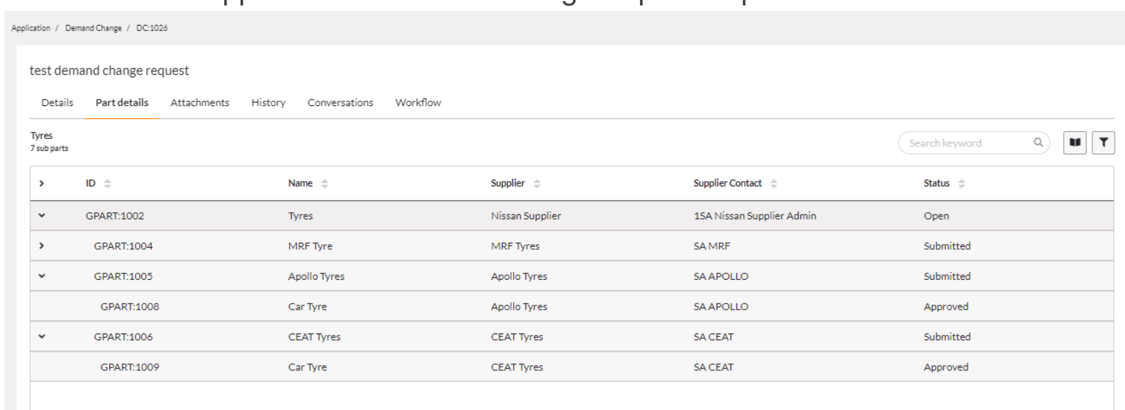


   The **Your Supplier Status** field shows the count of responses from the suppliers associated with the demand change request.
4. Click the response status hyperlink or the **Part Details** tab.



The **Part details** tab displays the primary part, child and sub-child parts in parts hierarchy (as applicable) along with its associated supplier details and supplier status of the respective part.

5. Click **>** to view the associated sub-parts and their suppliers along with the supplier status of their respective part.
   The following screen is an example showing the status of various suppliers' response and their child suppliers for a demand change request of parts.

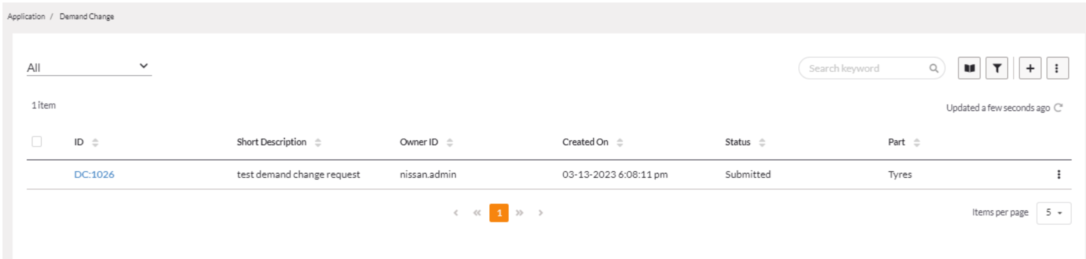


Approving/Rejecting Demand Change Request Response

The owner of the case/task can approve, reject or send for rework the response from the primary supplier when the response has **Submitted** status. Primary supplier can submit response only when the supplier status of all the sub-parts is updated with status as **Approved** or **Rejected**.

To approve, reject or send to rework the responses for the demand change request:

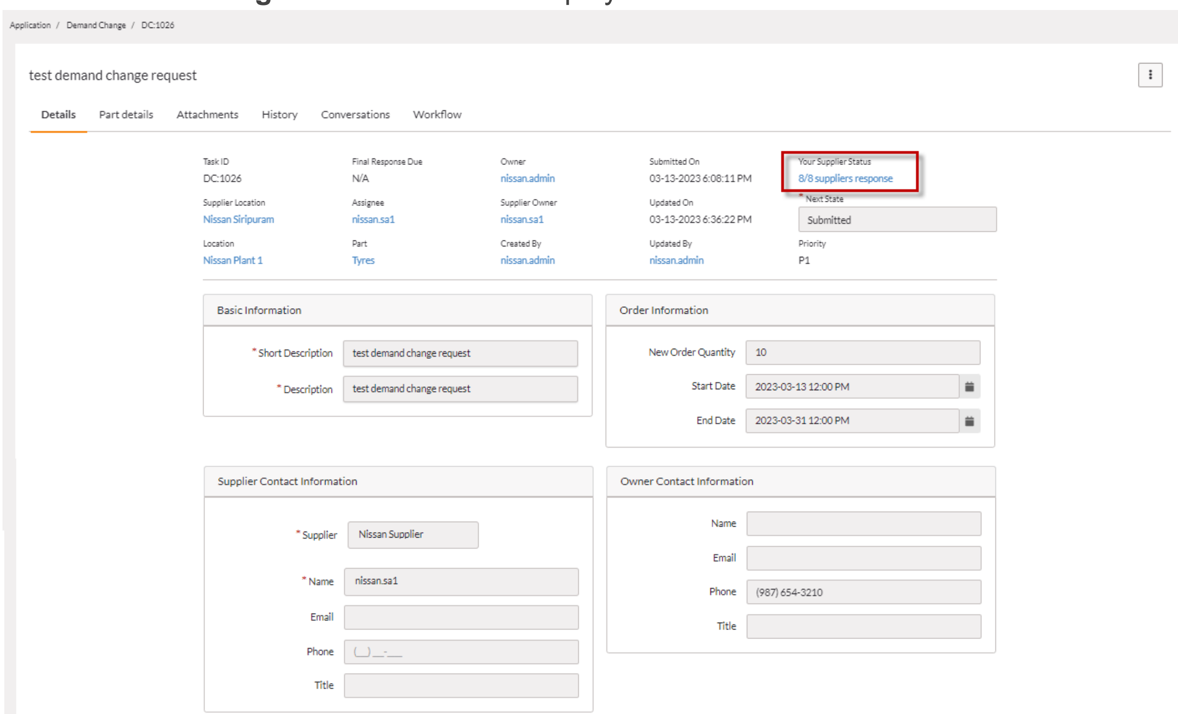
1. Log in to the iENT Application.
2. On the homescreen, under **My Apps** section, click the **Demand Change** app.
   The **Demand Change** screen is displayed.



All existing demand change tasks/requests will be listed here.

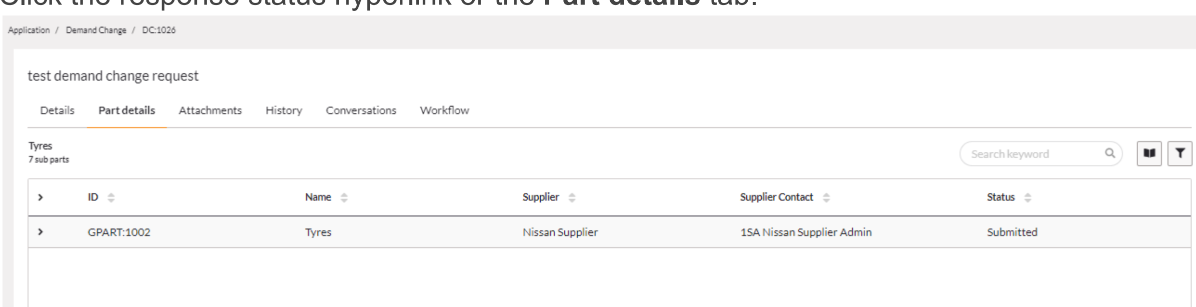
6. Click the **ID** link of the demand change request for which you want to view the responses and take action.

   The **Demand Change Details** screen is displayed.

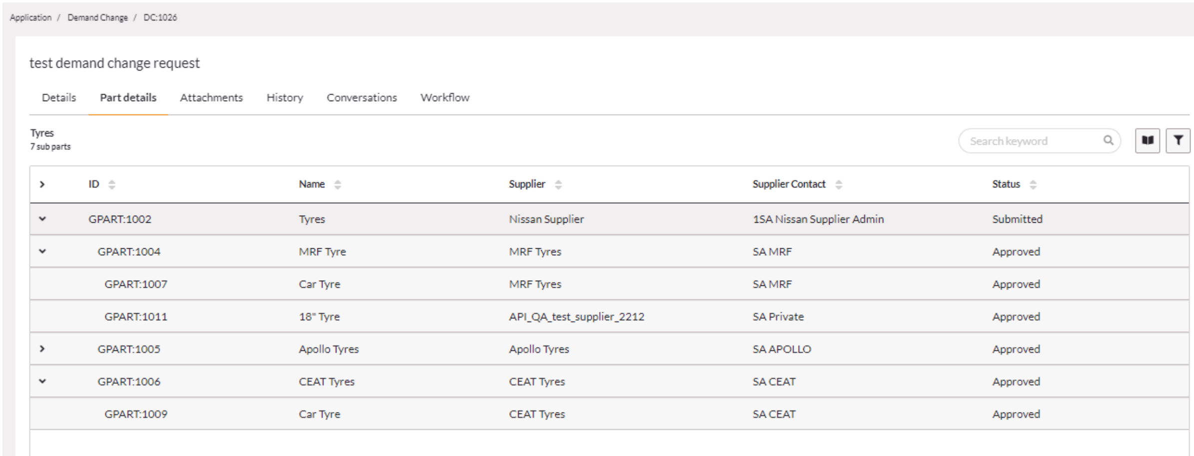


The **Your Supplier Status** field shows the count of all the responses received.

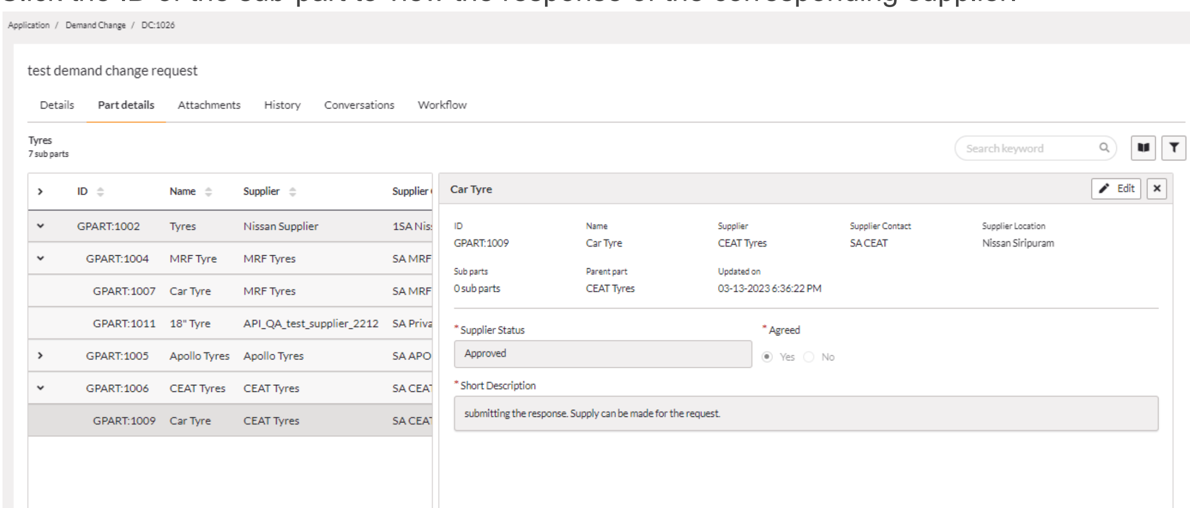
7. Click the response status hyperlink or the **Part details** tab.



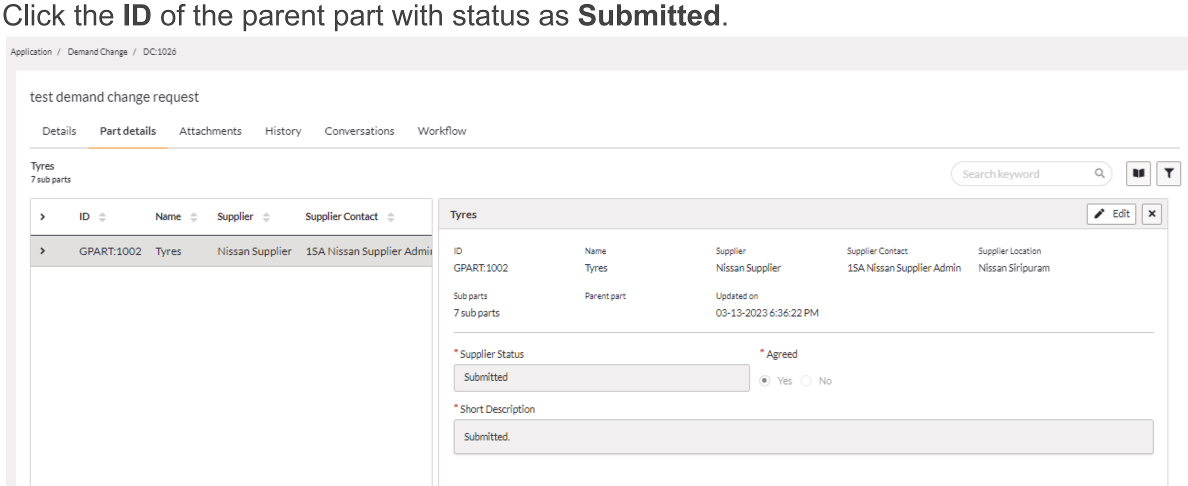
8. Click **>** to view the responses of the suppliers for the sub-parts.



9. Click the ID of the sub-part to view the response of the corresponding supplier.

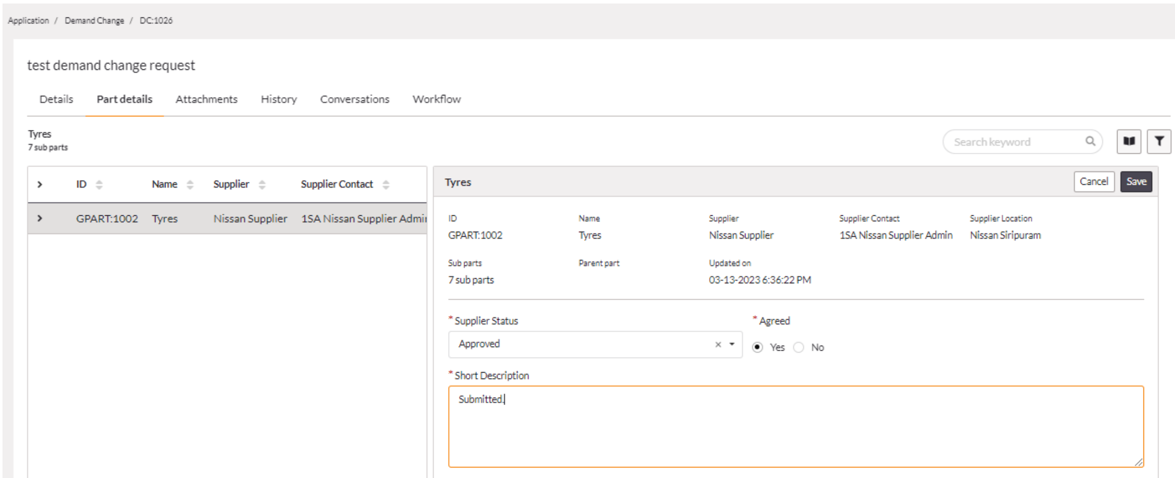


10. Review the response. If response is not satisfactory, click **Edit** and select **Rejected** or **Rework** option from the **Supplier Status** field as required and click **Save**, else click **X** if response meets the requirement.
11. Similarly, review the responses for other child parts and take action.
12. Click the **ID** of the parent part with status as **Submitted**.

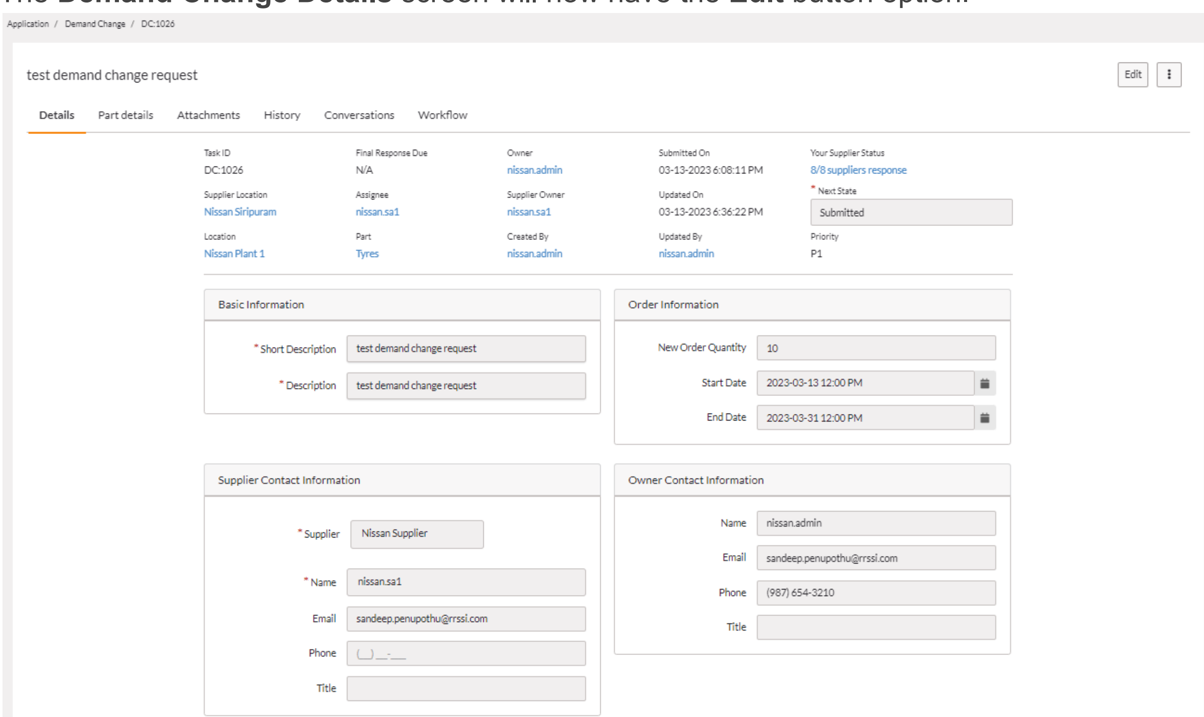


13. Click **Edit** and select the **Supplier Status** as applicable. The options are:

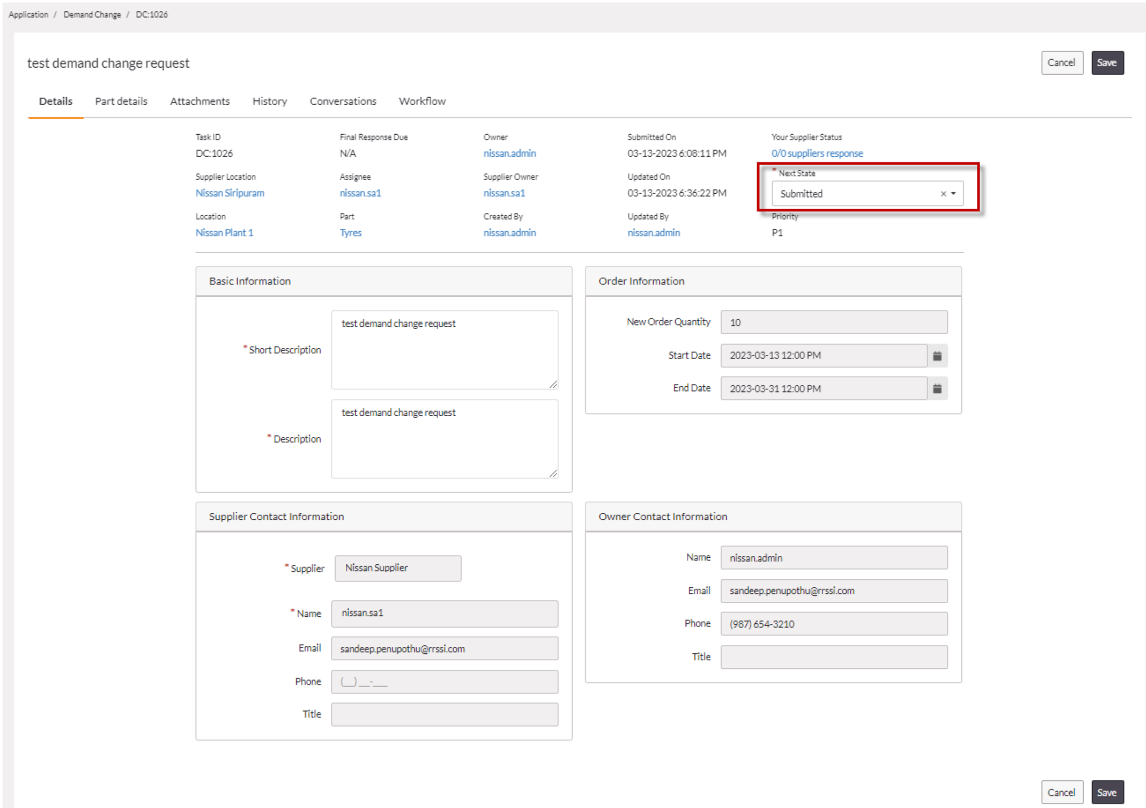
- Approved
- Rejected
- Rework



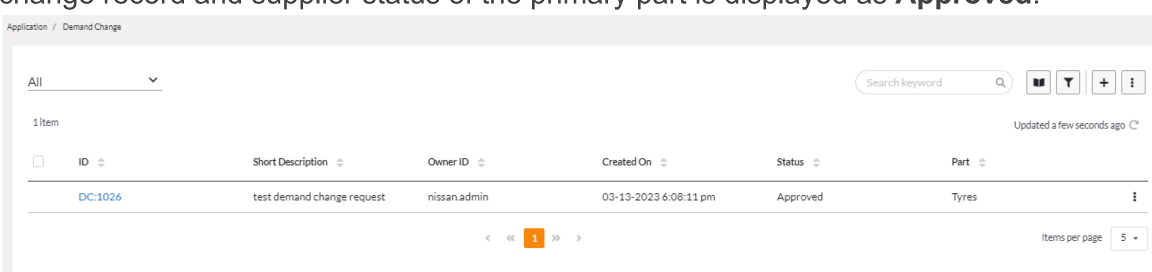
13. Click **Save**.
    Note: If status of one or more of the sub-parts response is **Open**, the app will not allow to save the task.
14. Click the **Details** tab.
    The **Demand Change Details** screen will now have the **Edit** button option.



15. Click **Edit**.
    The screen reloads with some fields in editable mode.



16. From the dropdown list in the **Next State** field, select **Approved** option to complete the task.
17. Click **Save**.
    The **Demand Change** records list is displayed, and the status of the particular demand change record and supplier status of the primary part is displayed as **Approved**.



Other iENT Features

In this section, we cover some of the additional features found on the iENT application that will help you further manage, optimize, administer and monitor all your tasks, users, customers and applications.

You can perform more actions using these additional iENT features:

- **How to Filter, Search and Sort Data**
- **Customize Your iENT Profile**
- **View and Update Your Tenant Information**
- **Approve or Reject Data Import Requests**
- **Create and Manage Reports**
- **How to Monitor Your Audit Logs**
- **Sequence Management**
- **Schema Manager**
- **Configure Your Portal and Edit Navigation Links**
- **Import Export History**
- **Delegate**

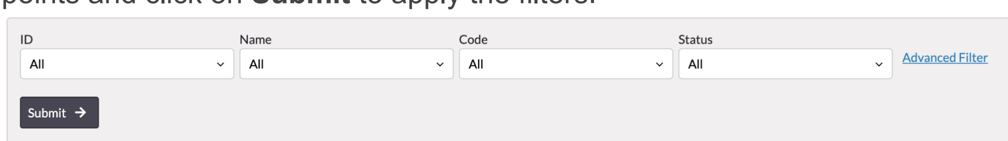
How to Filter, Search and Sort Data

iENT is a powerful tool that offers several capabilities to sift through records across the platform. In this section, you can get familiarized with the different view actions available to you based on the type of records you are viewing.

Filter

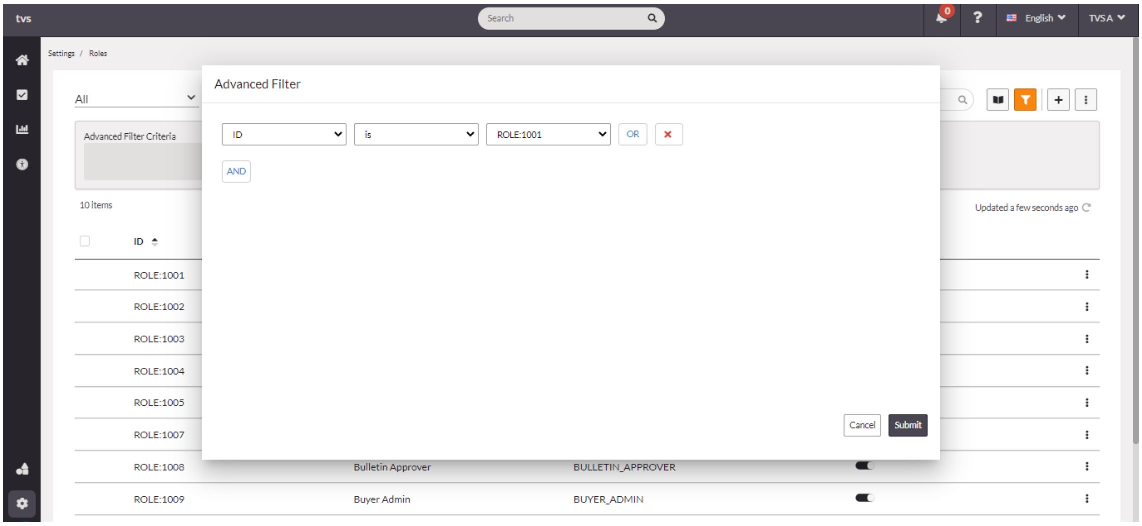
To filter out all the records displayed, click on the filter icon on the top right corner of the page.

Basic Filter: You can then select one or many of the filter parameters for the available data points and click on **Submit** to apply the filters.

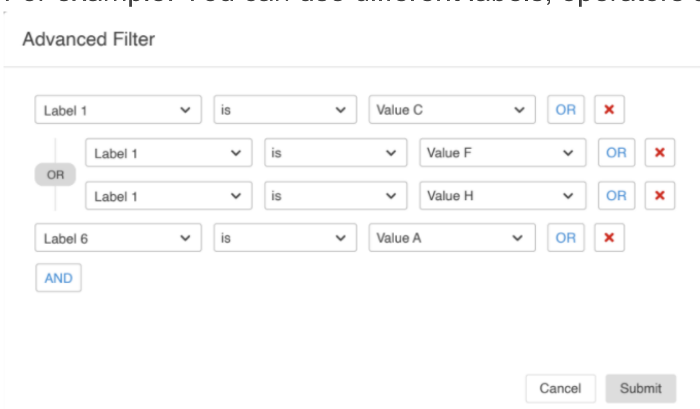


Advanced Filter: Selecting Advanced Filter offers you a filtration mechanism that can use more complex operators to filter out displayed records. For advanced filtration:

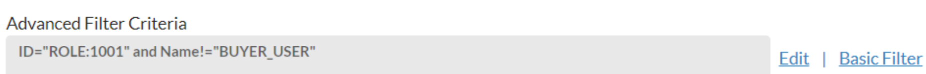
1. Click on **> Advanced Filter > Edit**.
   This will open a modal with editable filter fields and operators.



For example: You can use different labels, operators and filter values like below.

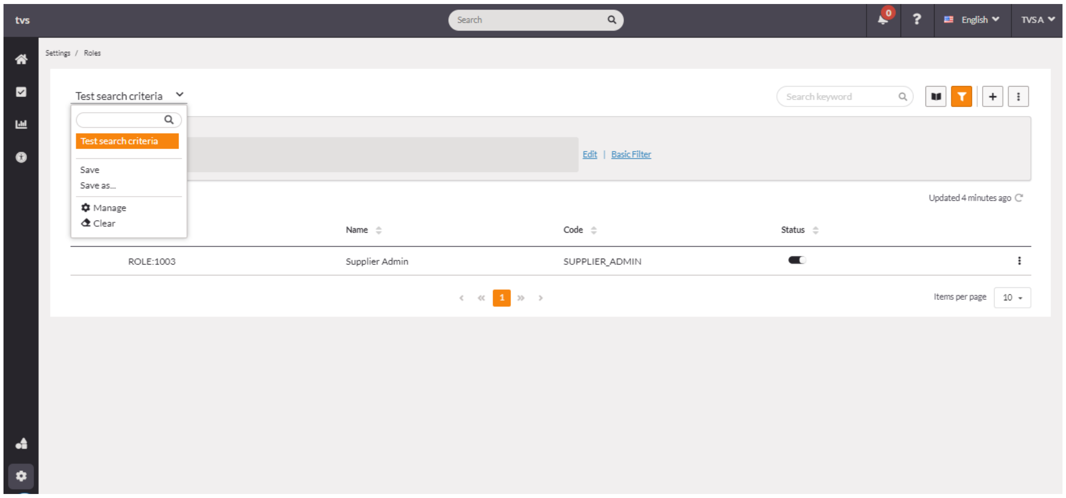


2. Click on **Submit.**
3. Based on your filters, an advanced filter criteria is generated.



Filter Management

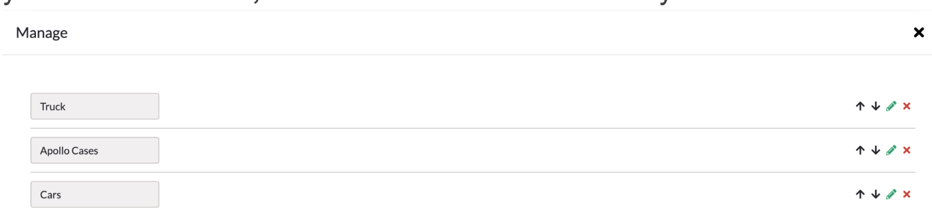
By default, all the records of your selected context are displayed. Click on the **All** dropdown, and select a preset filter to apply to the records.



You can also **Save** or **Save As** all the filter queries that you have currently applied to the records displayed.

Whenever you make any changes in an existing filter, an asterisk (*) suffix will appear near the filter name.

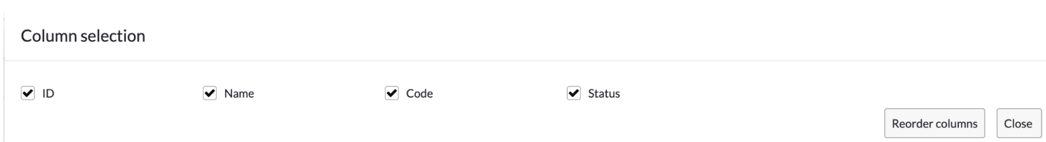
You can also manage all your filters by clicking on Manage from the dropdown. This will allow you to **Rename,** **Remove** and **Sort** your saved filters.



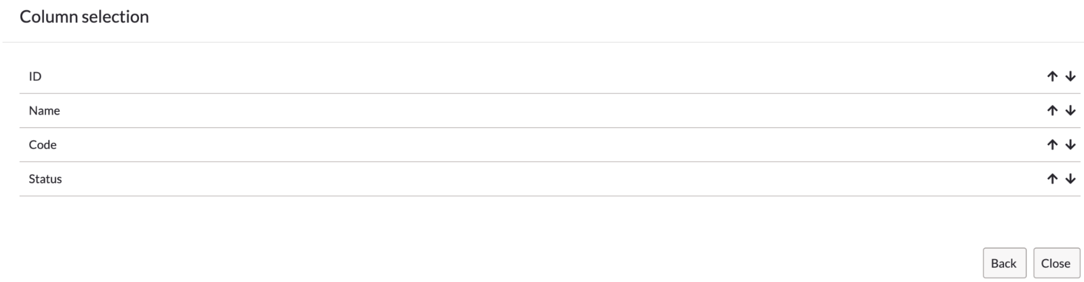
Click on Clear to clear any filters that you have applied.

Columns

You can further filter all your records based on the columns displayed. Click on the column icon , and check/uncheck the columns to display details as you require.



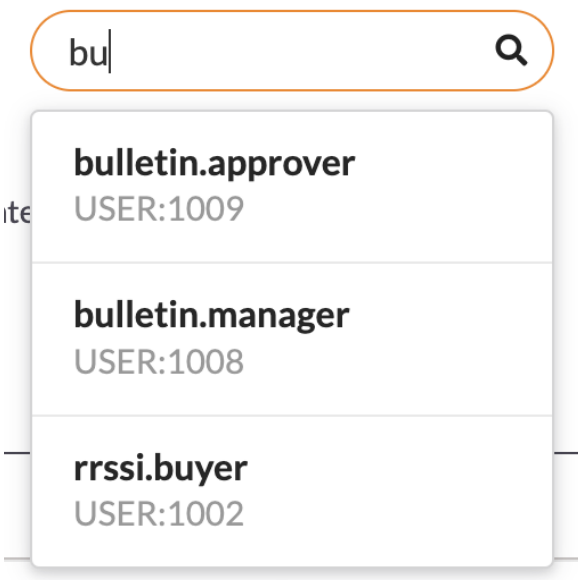
Click on the **Reorder columns** button to rearrange the order in which columns are displayed.



Use the arrows ↑ ↓ to move the columns around as needed.

Search

You can search the entire list by entering a keyword in the **Search** field and selecting the available records from the dropdown. This is the local search and presents data from the application or module being used.



Sort

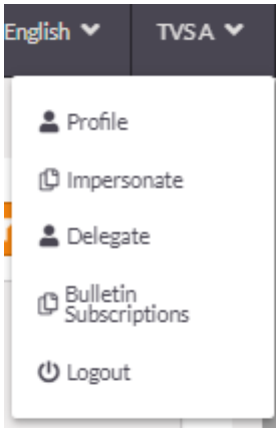
You can click on the arrows next to each column to sort the list of displayed records.

iENT Profile

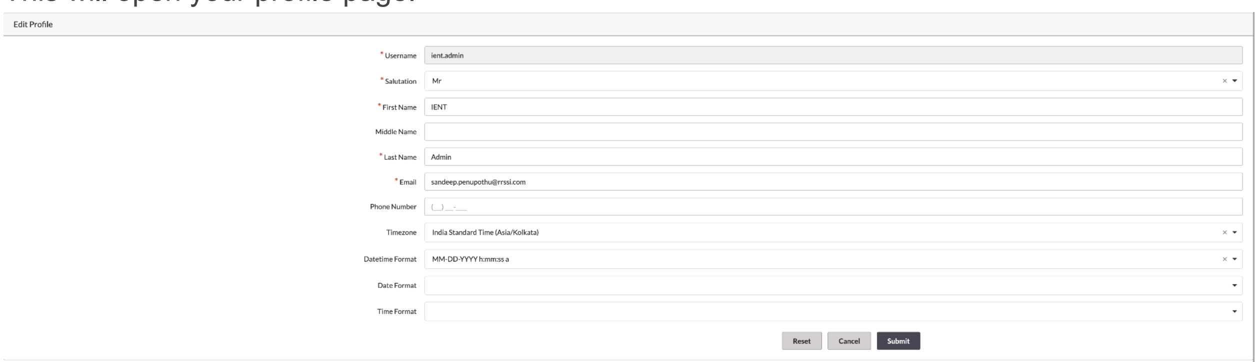
iENT Application enables you to customize your profile information and set application preferences to suit your convenience and aid your requirements.

To edit your profile details:

1. Login to the iENT Application.
2. On the top menu bar of the application, click on your user *name* on the right corner of the screen.



3. From the dropdown, click on **Profile.**
4. This will open your profile page.



You can view and edit the following information:

- **Username:** This is your iENT username.
  Note: This field is not editable.
- **Salutation:** From the dropdown, you can select your salutation (*Mr, Mrs, Miss*).
  Note: This is a mandatory field.
- **First Name**
  Note: This is a mandatory field.
- **Middle Name**
- **Last Name**
  Note: This is a mandatory field.
- **Email**
  Note: This is a mandatory field.
- **Phone Number**
- **Timezone:** From the dropdown, select your preferred time zone. You can search for your preferred time zone on the dropdown's search bar.

    - **Datetime Format:** From the dropdown, select your preferred date-time format. You can search for your preferred format on the dropdown's search bar.
    - **Date Format:** From the dropdown, select your preferred date format. You can search for your preferred format on the dropdown's search bar.
    - **Time Format:** From the dropdown, select your preferred time format. You can search for your preferred format on the dropdown's search bar.
5. Click on **Reset** to reset all your entries. Click on **Submit** to confirm all your profile changes.

Tenant Management

On the Intelligent Enterprise Alliances (iENT) application, as the Buyer Administrator, you can view and update all your Tenant information.

iENT enables every tenant to configure settings and details in order to optimize all end-to-end operations. This includes everything from external authorization services to configuring your preferred data storage endpoint.

In order to manage all your tenant details, the following information is required:

Tenant Details

- **Organization Name:** This is the name of the organization.
  Note: This is a mandatory field.
- **Description:** Add a description of the organization.
- **Phone Number:** Organization's phone number.
  Note: This is a mandatory field.
- **Number of Employees:** The number of employees at the organization.
- **Preferred Endpoint:** This is the Realm used in Keycloak and the same name used as *organization* during user login.
  Notes:
    - *This input is case-sensitive*
    - *This is a mandatory field.*
- **DataSource Region:** The DataSource Region used to create tenant-based databases in a specified region.
  Note: This is a mandatory field.
- **TimeZone:** The default time zone to which the tenant users belong.
  Note: This is a mandatory field.
- **Datetime Format:** The default date time format to be used across tenant operations.
  Note: This is a mandatory field.
- **Active:** Status of the organization. Once the status is unchecked, the organization will become inactive and users will not be able to log into the application.

Tenant Address Information

- **Address 1:** Building and street information of your organization.
  Note: This is a mandatory input.
- **Address 2:** Optional additional address information.
- **City:** City information of your organization.
  Note: This is a mandatory input.
- **State:** Registered state address of your organization.
  Note: This is a mandatory input.
- **Country:** Country that the tenant belongs to
  Note: This is a mandatory input.
- **Zip Code:** Tenant's zip code.
  Note: This is a mandatory input.

External Authorization Services and Ariba Integration

- **Would you like to connect to an external system for authorization?**
  If any external system is going to be used as authorization for the organization's users, then select *yes*.
- **Would you like to connect Ariba for synchronization?**
  If you would like to connect to SAP Ariba for synchronization of Master and Partner (Supplier) Data, select *yes*. The following information is further required for connecting to your Ariba account.
    - **Master Data Application Key:** The Application Key registered in SAP Ariba for Master Data retrieval.
    - **X-realm:** The Realm registered in SAP Ariba.
    - **Master Data OAuth Client ID:** OAuth ClientId registered in SAP Ariba.
    - **Master Data OAuth Secret:** OAuth Secret registered in SAP Ariba.
    - **Partner Application Key:** Application Key registered in SAP Ariba for Partner Data retrieval.
    - **Partner OAuth Client ID:** OAuth ClientId registered in SAP Ariba for Partner Data retrieval.
    - **Partner OAut h Secret:** OAuth Secret registered in SAP Ariba for Partner Data retrieval.
    - **Service Account ID:** The iENT application user ID.
- **Partner ariba network sso login?**
  If you would like your partners to use your Ariba network SSO login to access the iENT portal, then select *yes.* The following information is further required to enable Ariba SSO login for partners.
    - **SSO Login X-Realm:** The Ariba supplied X-Realm SSO login.

Admin Information

- **Username**
  Note: This should be unique in the system.
- **Salutation**
- **First Name**
- **Middle Name**

- **Last Name**
- **Email**
- **Phone Number**

Usage Configuration

This is used to set usage limits per tenant

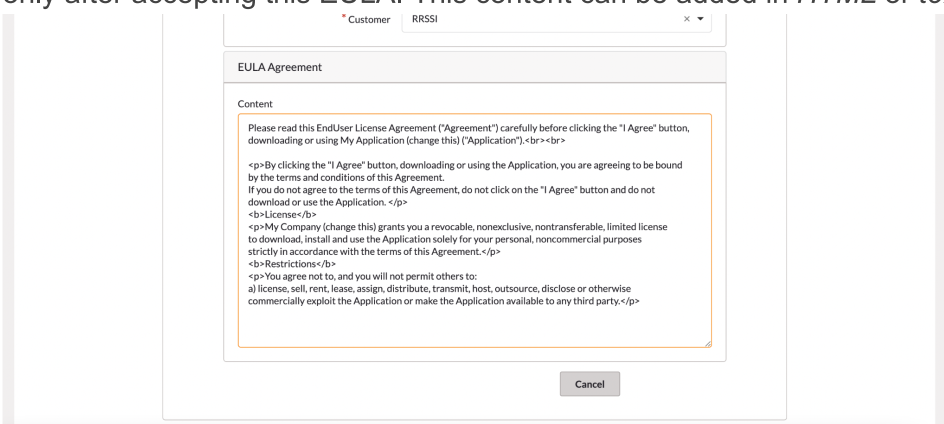
- **Max Users:** Maximum number of allowed users.
- **Max Transactions:** Maximum allowed transactions for all applications used by the tenant.
- **Total Attachment Size (MB):** Total size of all attachments of all the transactions for the tenant.

Organization

A customer on the iENT platform is an organization. Every organization can have multiple tenants associated with it. For example, you can have *organization-name_dev, organization-name_qa, organization-name_prod* as different tenants under a single organization. This field is the name of the *organization (iENT customer)* to which the tenant belongs to.
Note: This is a mandatory input.

EULA Agreement

For the sake of different compliances, the End User License Agreement (EULA) would be displayed to users when they login for the first time. Users will be allowed to use the application only after accepting this EULA. This content can be added in *HTML* or *text* format.

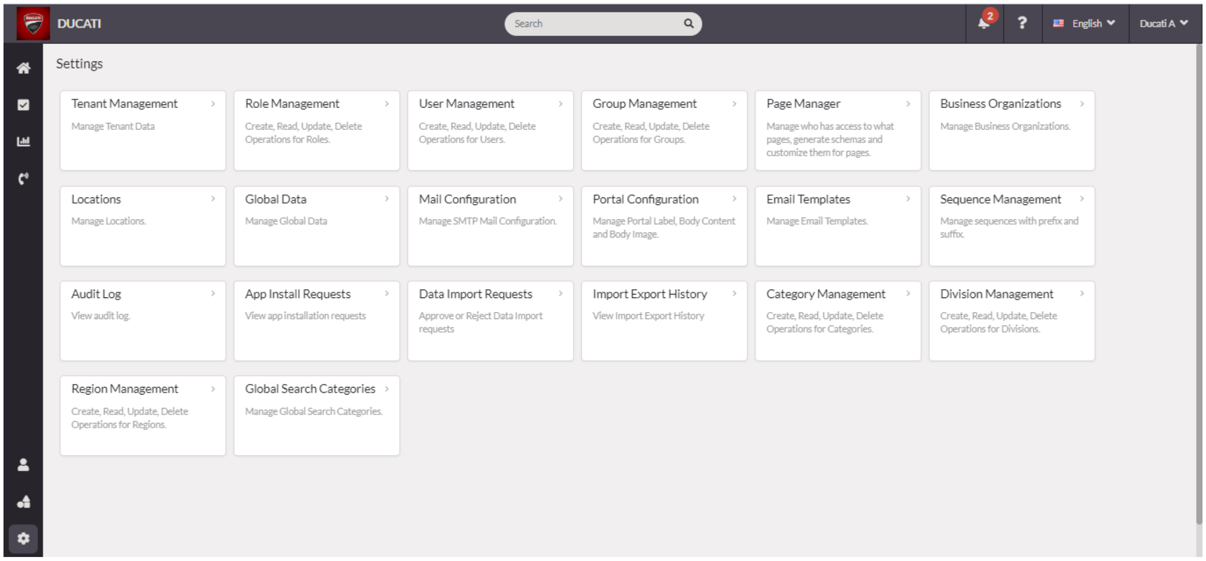


Edit Tenant Information

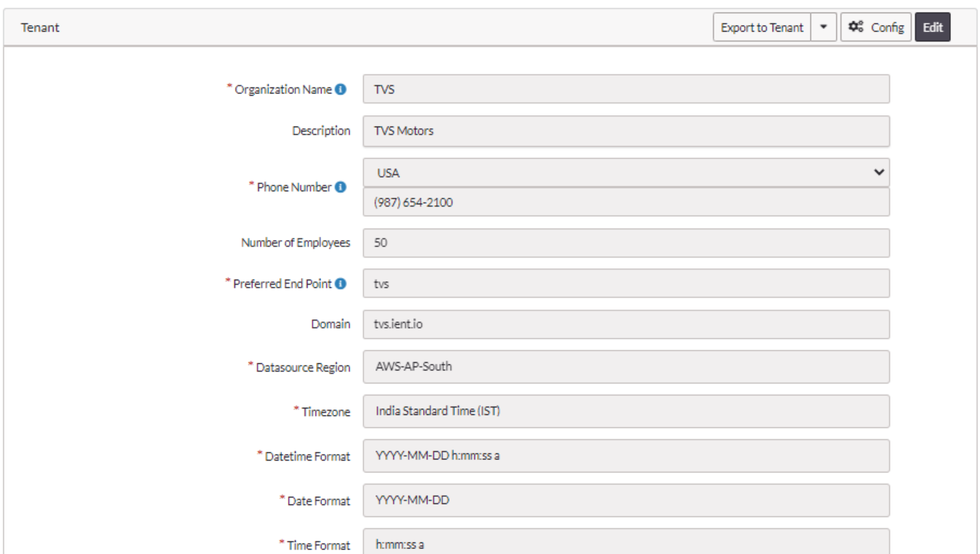
To edit your tenant details:

1. Login to the iENT Application.

2. Click on **Settings > Tenant Management**.



3. This will open your tenant details in the read-only mode. Click on the **Edit** button.



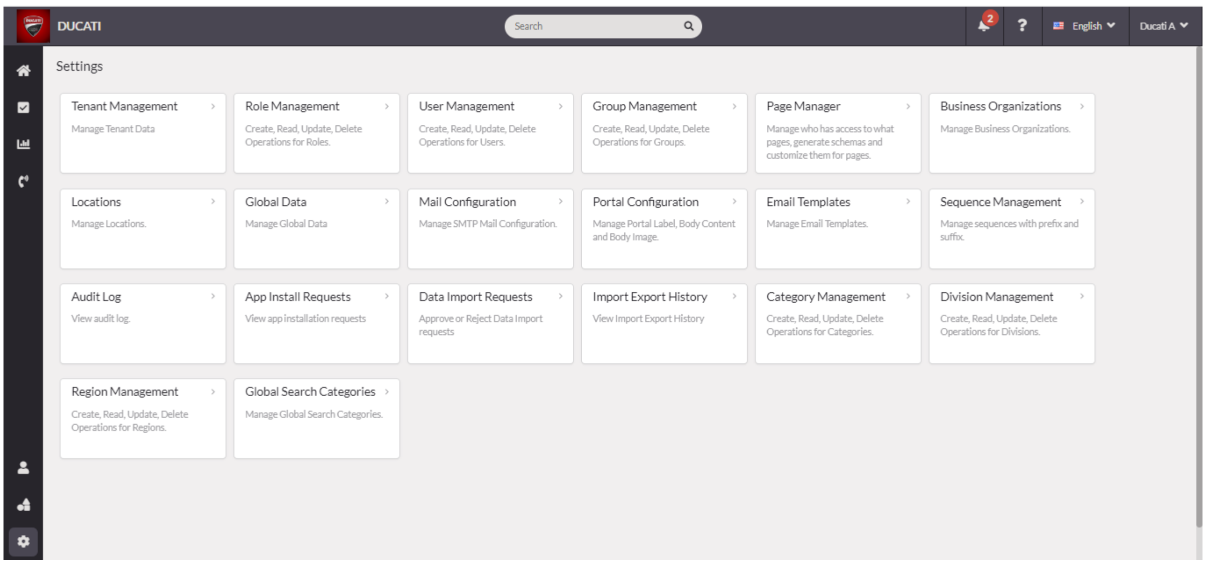
4. This will open the tenant's details in *edit mode*. The following details can be edited:
    a. Organization information
    b. Tenant Address Information
    c. External authorization services
    d. Admin information
    e. EULA Agreement
5. Click on **Submit**.

Export to Tenant

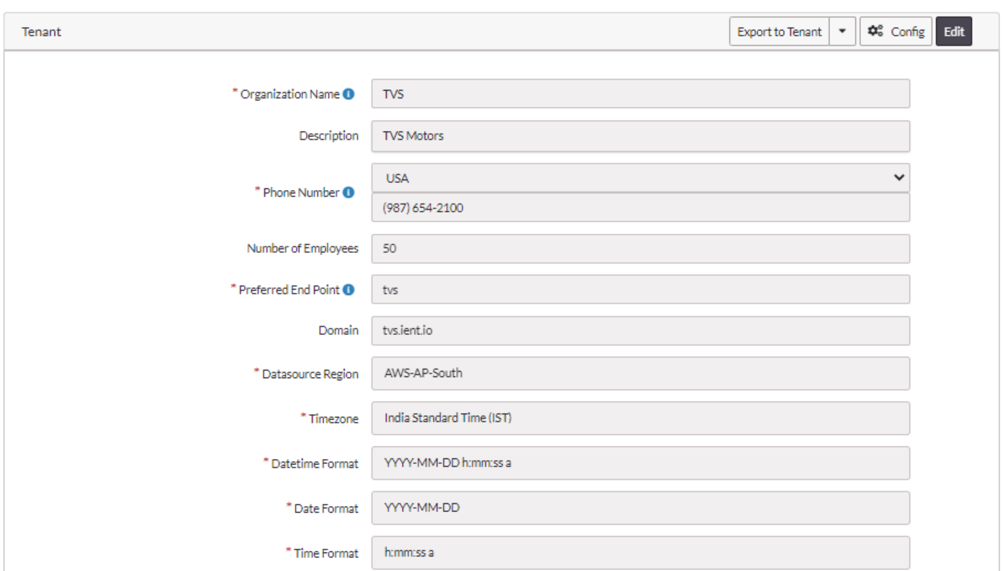
All the configured details of your tenancy can be exported to another tenant within your organization. Once exported, the receiving tenant will be able to approve this request and import all your tenant information.

To export your tenant details:

1. Login to the iENT Application.
2. Click on **Settings > Tenant Management**.



3. Click on the dropdown near **Export to Tenant.**
4. Select the *tenant* you want to export all the details to.

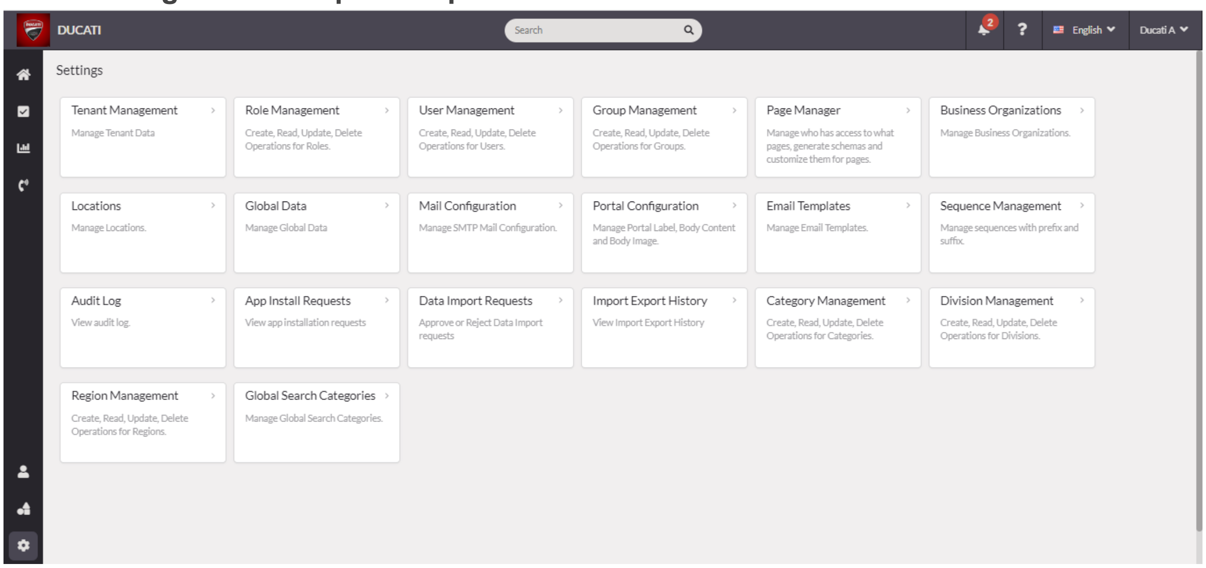


5. The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

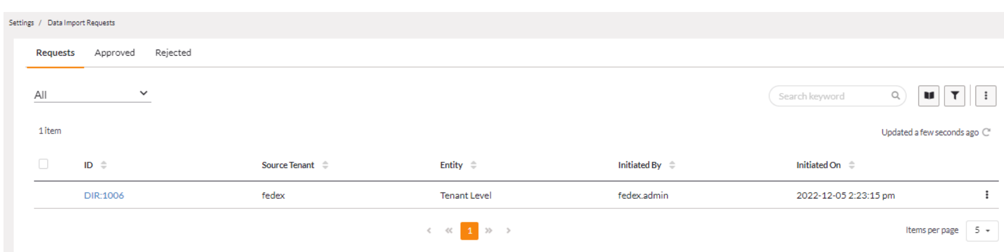
Data Import Requests

When another tenant exports data from their account to yours, as the Buyer Administrator, you will need to approve this request to be able to import said data. On the iENT platform, you will be able to view these requests, as well as review all your previously approved and rejected data import requests. To do this:

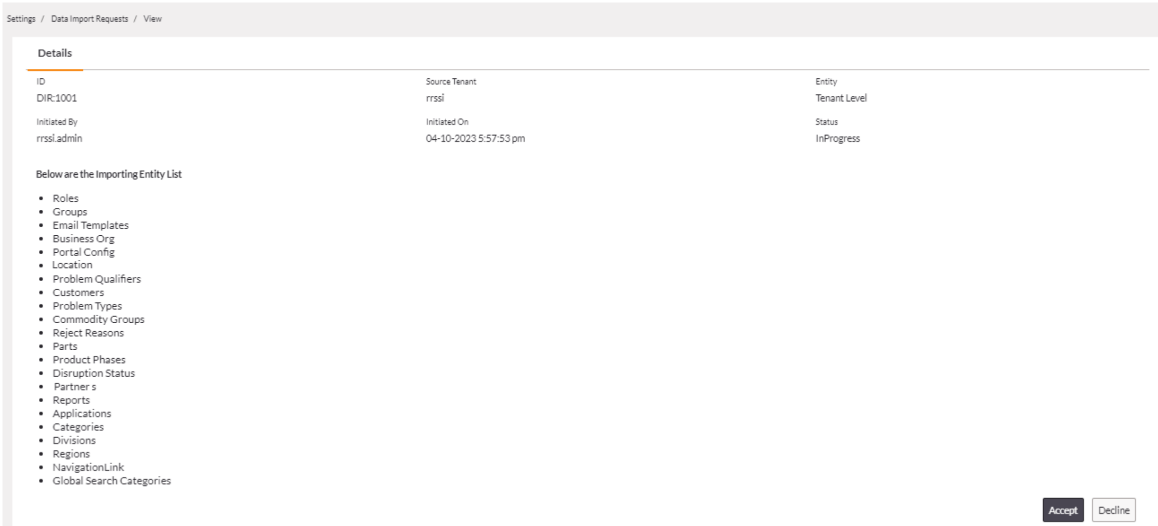
1. Log in to the iENT Application.
2. Go to **Settings > Data Import Requests.**



3. Under the **Requests** tab, you will be able to view and process any pending requests.



4. Click on any of the requests to view details of the Data Import.



5. Click on **Accept**or **Decline** as required.
6. Toggle to the **Approved** and **Reject** tabs to view all the requests that you have previously approved and rejected, respectively.
   See *here* to explore how you can search, view, sort, and filter all the displayed records.

Create and Manage Reports

As the Buyer Administrator, you can create reports that are specific to an application by uploading the report design file and configuring the required conditions.

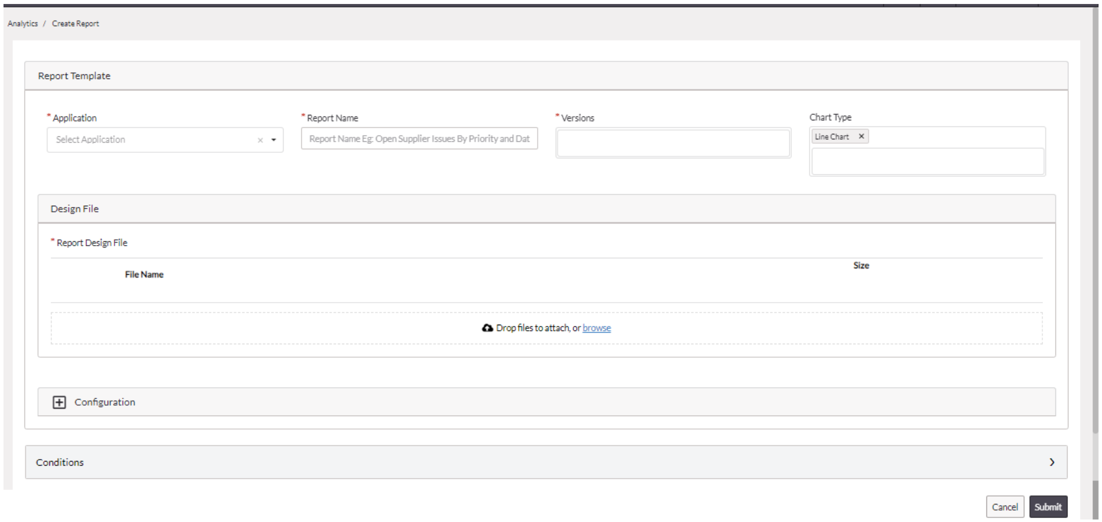
In this section, we will discuss all the features pertaining to Report Management, such as:

- Create Reports
- View Reports

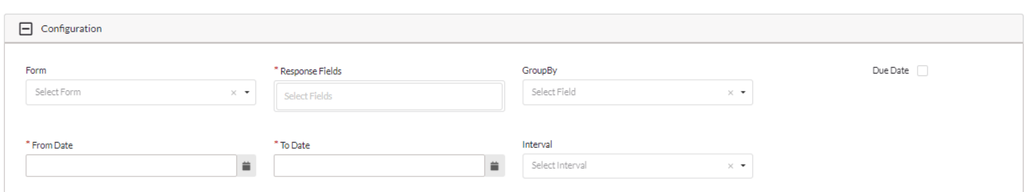
Create Reports

To create a report:

1. Log in the iENT Application.
2. Go to **Analytics** and select the **+** button from the top right corner.



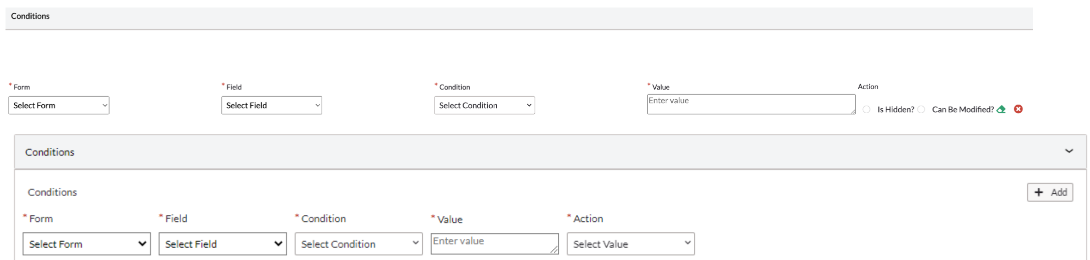
3. Enter the following information:
   - **Application:** The application for which you are creating this report. Select from the dropdown list.
     Note: This is a mandatory field.
   - **Report Name:** Provide a unique name for this new report.
     Note: This is a mandatory field.
   - **Versions:** Select one or more versions of the selected application. The data will be queried with the selected versions.
     Note: This is a mandatory field.
   - **Chart Type:** Select one or more charts from the dropdown (*line chart, bar chart, pie chart, table*) for your report design.
     Note: This is a mandatory field.
   - **Report Design File:** Create a report using the BIRT design tool and upload the design file. See here for more information.
     Note: This is a mandatory field
   - **Configurations:** Click the **+** on the **Configuration** section to view the configuration options.



     - **Form:** You can select a form from the available forms for the latest selected version of your selected application.
     - **Response Fields:** You can select one or more fields from the selected form. To select fields from another form, simply select a different form and add your fields.
       Note: This is a mandatory field.
     - **Group By:** Use this option to group different fields as required.

- **Due Date:** Select this option if you want to data to be fetched as per due date. Selecting this option removes the **From Date**, **To Date** and **Interval** options.
- **From Date:** Select the start date from which you want data to be fetched. *Note: This is a mandatory field.*
- **To Date:** Select the end date from which you want data to be fetched. *Note: This is a mandatory field.*
- **Interval:** You can select intervals (*daily* / *weekly* / *monthly* / *yearly*) based on which data can be grouped and displayed in report charts.

○ **Conditions:** Click on **Conditions** section to configure the conditions for the report and click on **+Add** to add one or more conditions. Enter the following details:



- **Form:** Select a form from all the available forms. *Note: This is a mandatory field.*
- **Field:** Select the field on which you want the condition to be applied. *Note: This is a mandatory field.*
- **Condition:** Select a conditional operator (*equals, not equals, in, not in, all, etc.*). *Note: This is a mandatory field.*
- **Value:** Enter the value to apply conditions on. *Note: This is a mandatory field. You can use commas to separate values.*
- **Actions:** From the dropdown list select one of the following options. This is a mandatory field.
  - **Keep Hidden:** If checked, this row will not be visible to users executing or viewing this report.
  - **Can be modified:** If checked, users can change values and conditions of the field while viewing the report.

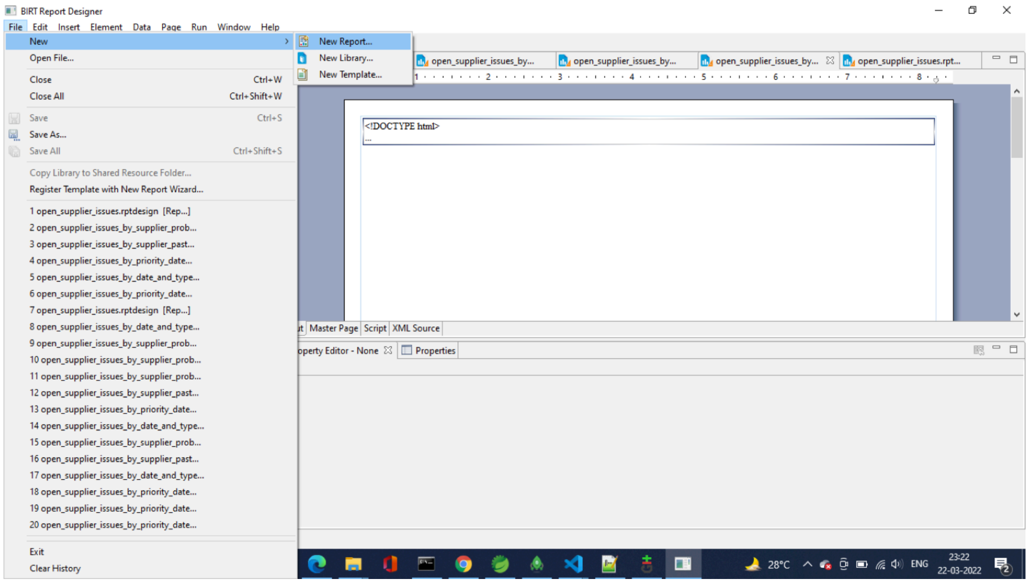
4. Click on **Submit**.

Generate Report Design Files

To generate report design files:

1. Download the BIRT Designer Tool from https://download.eclipse.org/birt/downloads/drops

2. Create a new report from the BIRT Designer tool by selecting **File>New>New Report**.



You can use the existing templates like line charts, bar charts, tables, or any third party libraries such as D3.js. (https://d3js.org/)

3. At runtime, the selected response fields' data will be sent as json strings to the report via the *data* report parameter.
4. Once the report is created, the file will be generated in an .rtpdesign format.

Below is a sample data that will be sent as the input to a report:


```
{
    "reportTranslationFields":{
    "Report Title":"",
    "y-axis-label":"",
    "Report Name":"",
    "x-axis-label":""
     },
    "data":[
        {
         "date":"2022-03-15",
        "count":4,
        "Problem Type":"Parent Problem Type"
    }
    ],
    "dateFormat":"yyyy-MM-dd",
    "chartType":"lineChart/barChart/pieChart/table",
    "fields":{
        "supplierId":"Volkswagen"
    },
    "responseFields":{
```

```
            "date":"date",
            "count":"count",
            "problemType":"Problem Type"
        }
}
```


- *reportTranslationFields:* Translated values will be sent as input to the report based on the selected language.
- *data:* The actual data used to plot the graph will be sent.
- *dateFormat:* User specific date format will be sent if present or else tenant specific date format will be sent as input.
- *chartType:* Indicates the chart that needs to be plotted (Line Chart/ Bar Chart/ Pie Chart/ Table).
- *responseFields:* Sends all the Response Fields selected during report configuration.

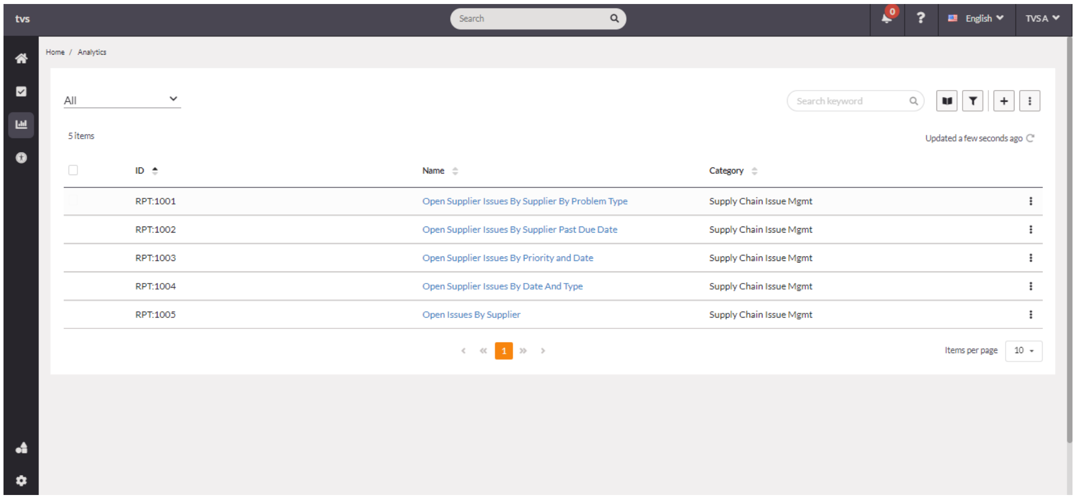
Note: *D3.js Reference Links:*

- *https://d3-graph-gallery.com/index.html*
- *https://d3-graph-gallery.com/graph/pie_changeData.html*
- *http://bl.ocks.org/caged/6476579*
- *https://d3-graph-gallery.com/graph/barplot_stacked_hover.html*
- *https://d3-graph-gallery.com/graph/line_several_group.html*

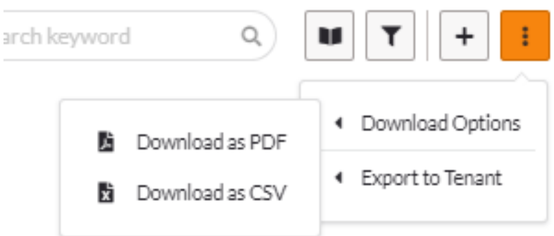
View Reports

To view all reports:

1. Log in the iENT Application.
2. Go to **Analytics**
   You can view all the created reports. See *here* to explore how you can search, view, sort, and filter all the displayed records.

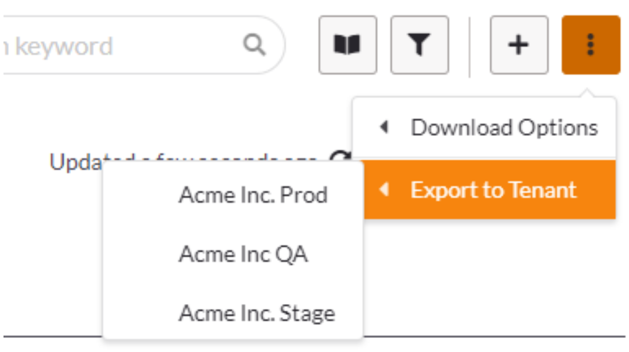


3. To download a list of reports, select the particular reports and then click on the kebab menu on the top right corner of the screen and select **Download Options** as needed:



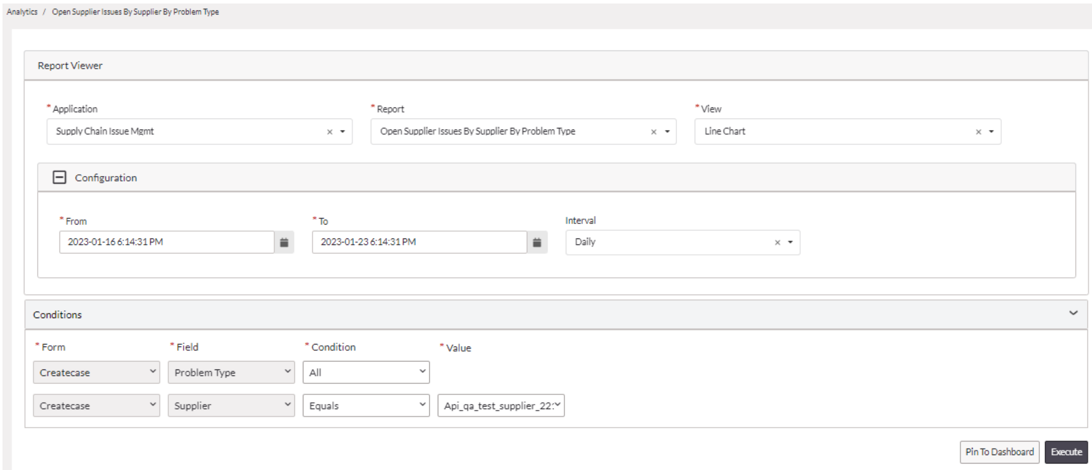
   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

4. To export reports to a specific tenant, select the particular reports and then click on **Export to Tenant** from the kebab menu on the top right corner, and select a target tenant.



The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

5. To view a report, click on a *report name* or click on **View** from the kebab menu on your selected report.



6. You will be able to view all the configured conditions. Users will be able to change the condition/value/ From Date/ To Date/ Interval/ Chart Type inputs.

   Pin To Dashboard: Click on this button to pin the selected report with the current conditions on to your dashboard for quick access.
   Execute: Click on this button to generate a report based on the modified conditions and configurations.

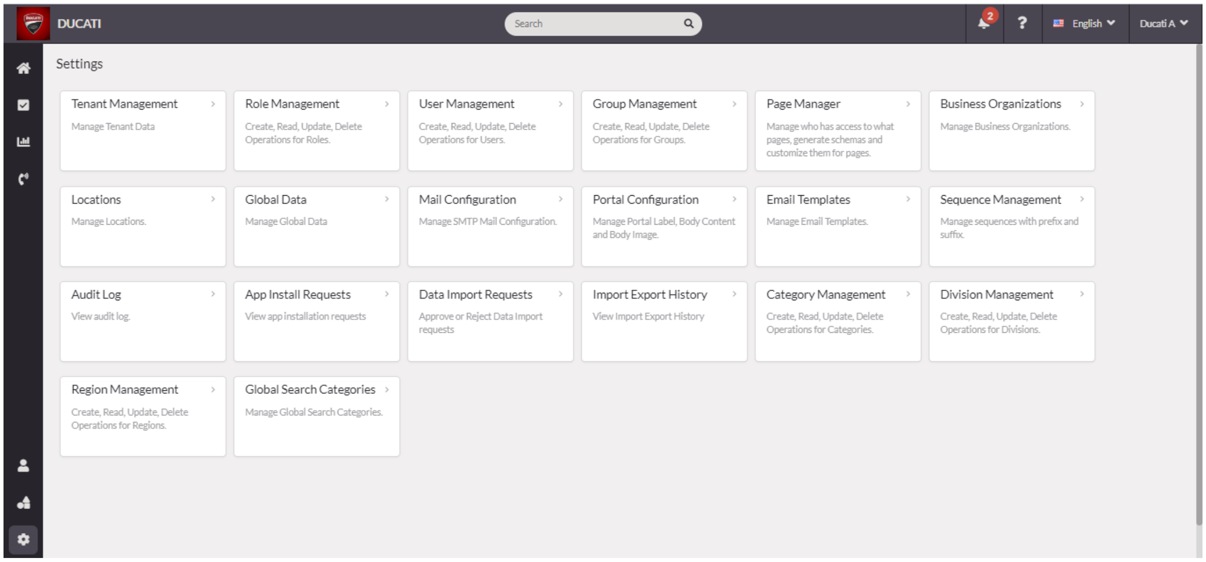
Audit Logs

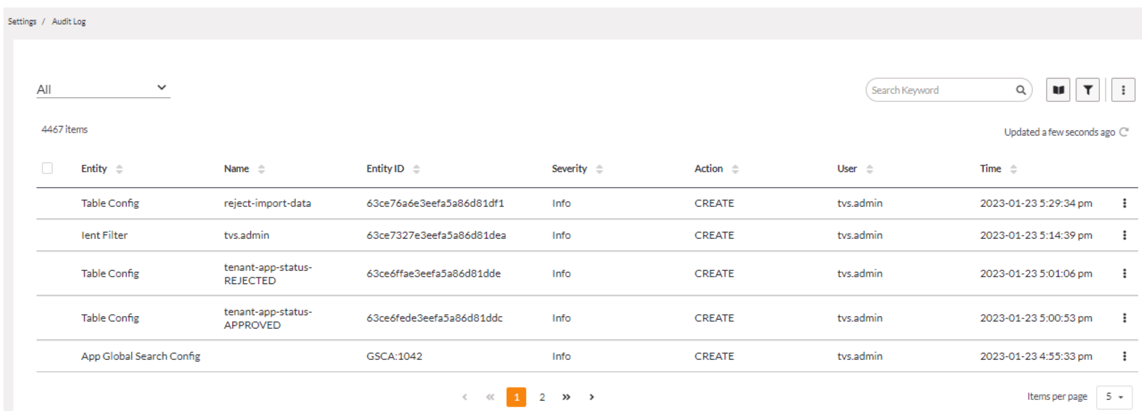
The iENT Application allows you to monitor all important user activities with timestamps and details.

To view all Audit Logs:

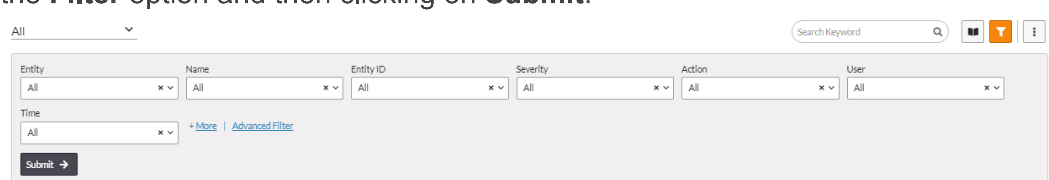
1. Log in to the iENT Application.

2. Go to **Settings > Audit Log**.

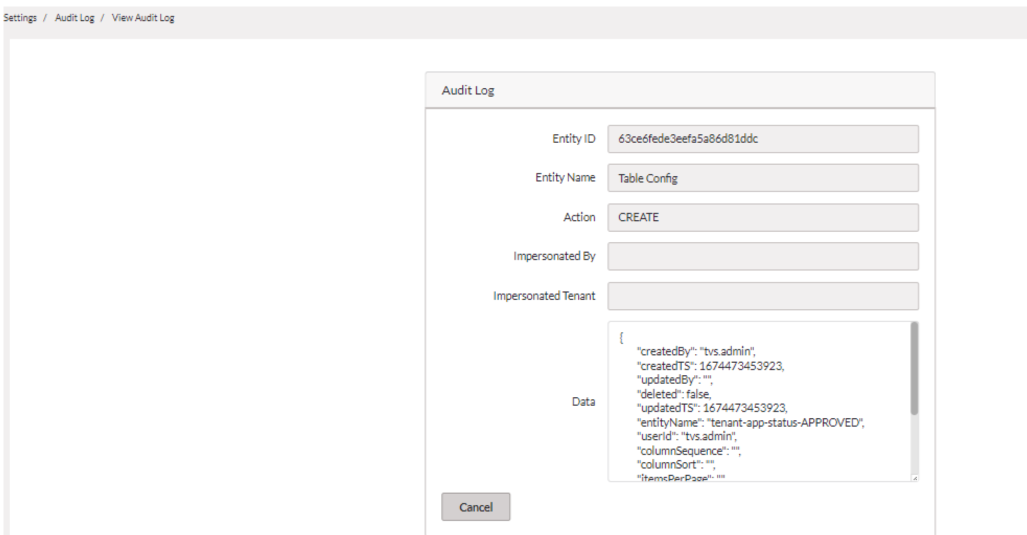




3. The following details of all audit entities are displayed:
   - **Entity**
   - **Name**
   - **Entity ID**
   - **Severity**
   - **Action**
   - **User**
   - **Time**
4. You can search all the audit logs using one or many of the following parameters using the **Filter** option and then clicking on **Submit**:



   - Entity
   - Name
   - Entity ID
   - Severity
   - Action
   - User
   - Time
5. In order to view a single log, click on the selected entity from the list or click on **View** from the kebab menu. The following information will be displayed:



   - **Entity ID**
   - **Entity Name**
   - **Action**
   - **Impersonated By**
   - **Impersonated Tenant**
   - **Data**

Sequence Management

iENT enables you to manage the sequence number used or generated for all data records in the system.

This table displays some examples of the sequence information of data records.

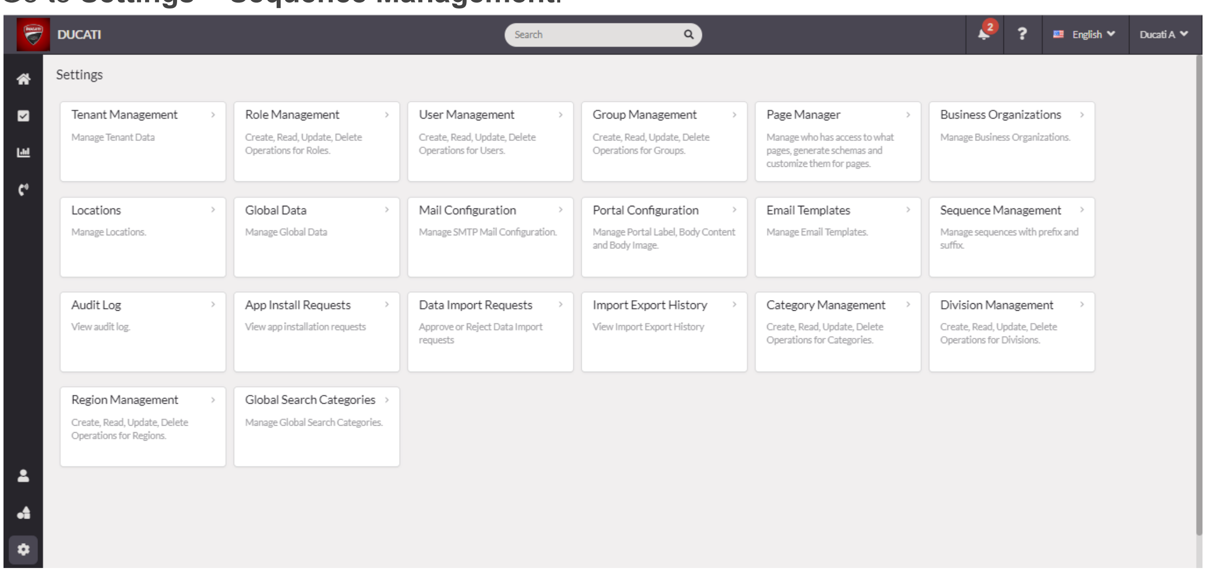
	Sequence Name	Description
1	application	Sequence ID for application-related info that is not displayed in the UI.

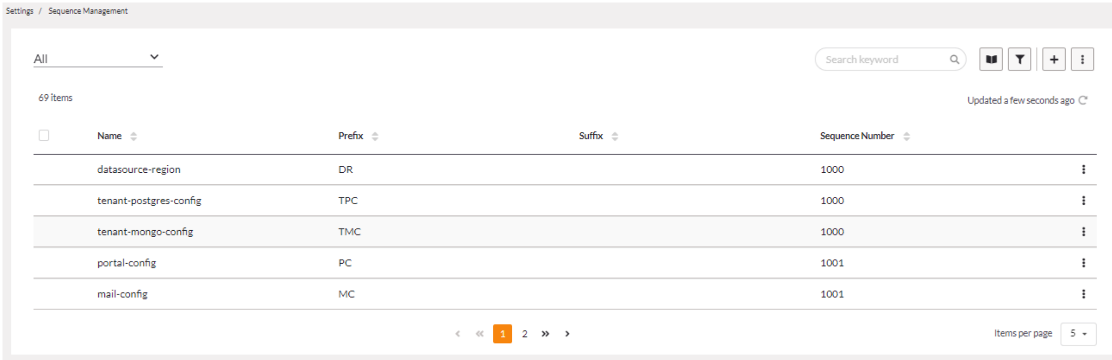
2	app-supply-chain-issue-mgmt	Sequence ID for case creation in the supply chain issue management application.
3	bo-department	Sequence ID for departments inside the Business Organization.
4	bo-lc	Sequence ID for Labor Codes inside the Business Organization.
5	bo-pl	Sequence ID for Product Lines inside the Business Organization.
6	business-org	Sequence ID for Business Organization
7	comment	Sequence ID for conversations on the application that are not displayed in the UI.
8	commodity-group	Sequence ID for commodity groups in Global Data.
9	customer	Sequence ID for customers in Global Data.
10	disruption-status	Sequence ID for disruption status of Global Data.
11	email-template	Sequence ID for email templates.
12	icase-priorities	Sequence ID for priorities in Global Data.
13	ient-user	Sequence ID for users.
14	page-schema	Sequence ID for page schemas.
15	parts	Sequence ID for parts in Global Data.
16	location	Sequence ID for Locations.
17	location-department	Sequence ID for Location's department.
18	location-lc	Sequence ID for Labor codes inside a location.
19	location-pl	SequenceID for Location Lines inside locations.
20	portal-config	Sequence ID for portal configuration.
21	problem-qualifier	Sequence ID for problem qualifier in Global Data

22	problem-type	Sequence ID for problem type in Global Data.
23	production-phase	Sequence ID for production phase in Global Data.
24	reject-reason	Sequence ID for reject reason in Global Data.
25	response-settings	Sequence ID for response settings of Global Data, which will not show in the UI.
26	role	Sequence ID for role.
27	partner	Sequence ID for partner reason of Global Data.
28	partner-location	Sequence ID for partner location of Global Data.
29	tenant	Sequence ID for tenant.
30	report-config	Sequence ID for Reports

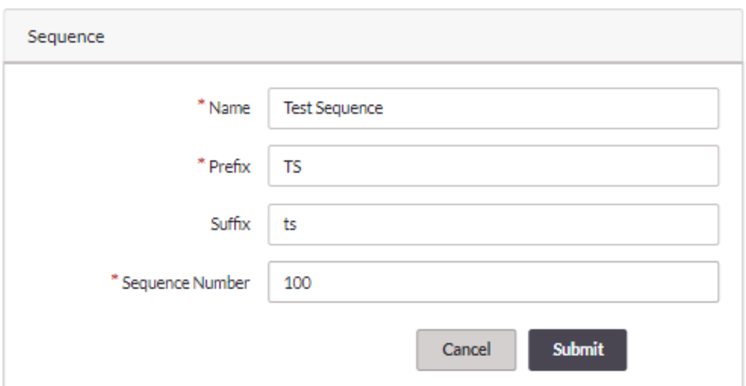
In order to add or edit a sequence:

1. Log in to the iENT Application.
2. Go to **Settings > Sequence Management**.





3. All the existing sequences will be displayed. You can do one of the following:
    - Click on the **+** button on the top right corner to add a new sequence.
    - On the selected sequence that you want to edit, click on the kebab menu and select **Edit.**
      Note: **Delete** option will only be available for the sequences created by the user.
4. Enter or update the following information:



    - **Name:** This is the name of the sequence that is assigned to a data model by default. It's read-only for existing models.
      Note: This is a mandatory field.
    - **Prefix:** This is a prefix *string* value of the sequence.
      Note: This is a mandatory field.
    - **Suffix:** This is a suffix *string* value of the sequence.
    - **Sequence Number:** This is an *integer* value from where the sequence starts. The sequence number should always be greater than the previous value.
      Note: This is a mandatory field.
5. Click on Submit.

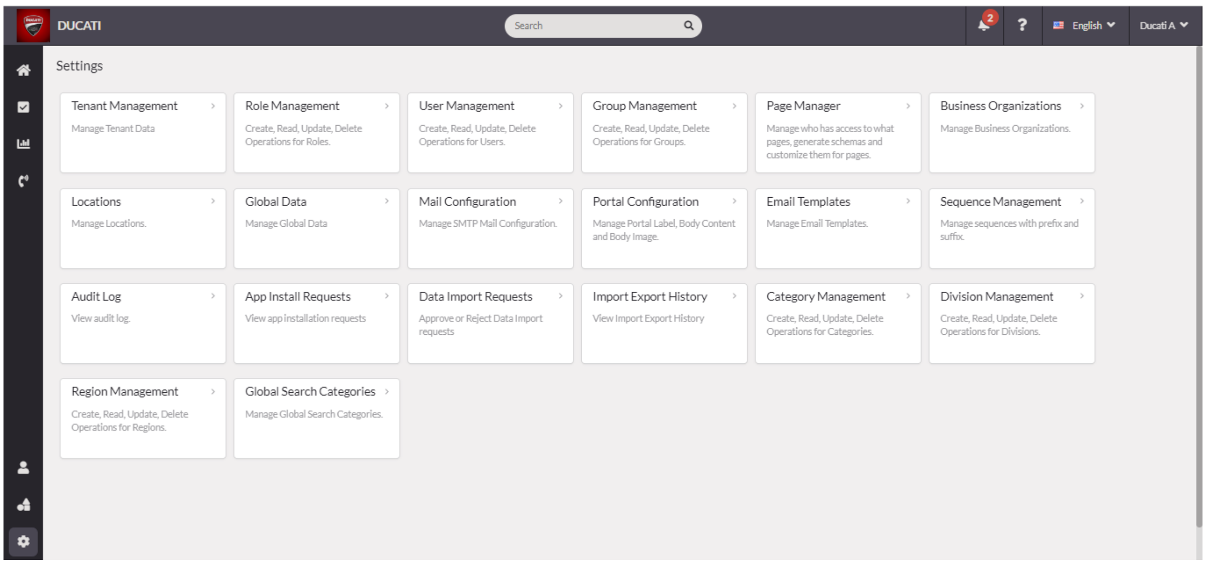
Page Manager

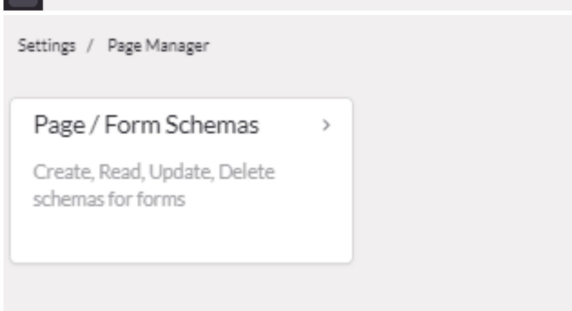
As an Org admin, you have the capability to create and generate dynamic forms and schemas that can be used across the application by multiple roles.

Create New Schema

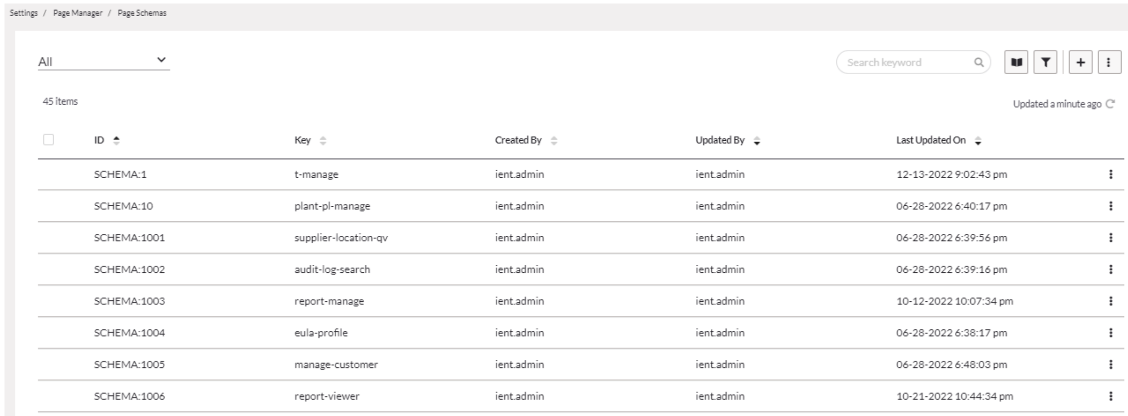
To create a new schema:

1. Log in to the iENT Application.
2. Go to **Settings > Page Manager**.

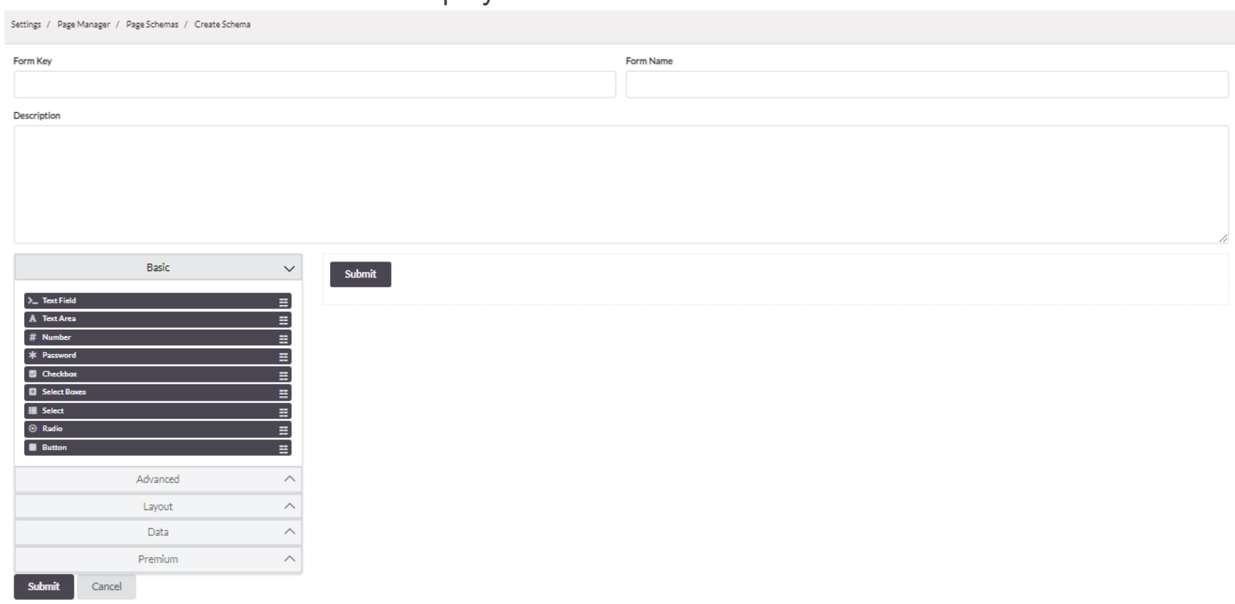




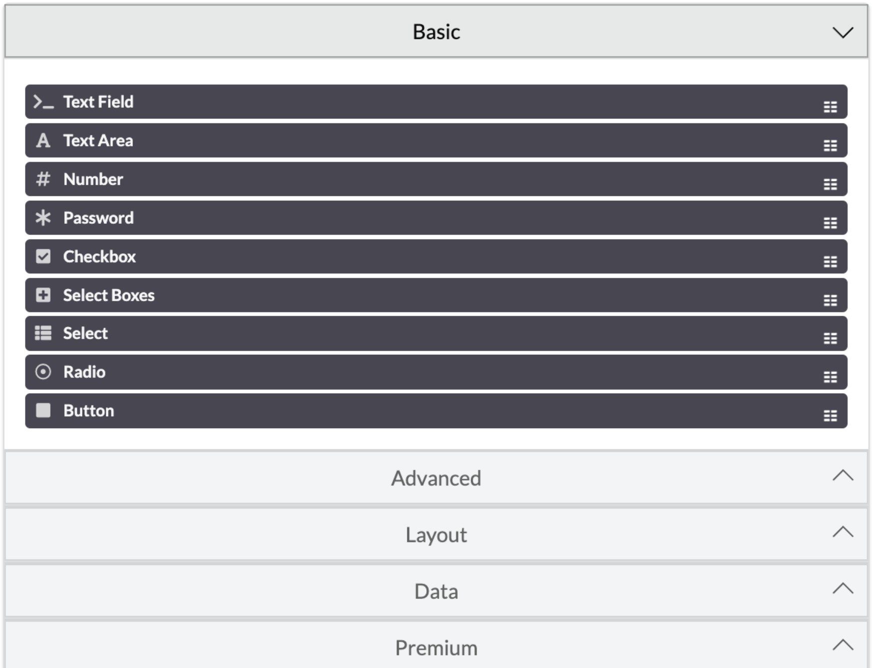
3. Click the **Page/Form Schemas** tile box.



4. Click **+** on the top right corner.
   The **Create Schema** screen is displayed.

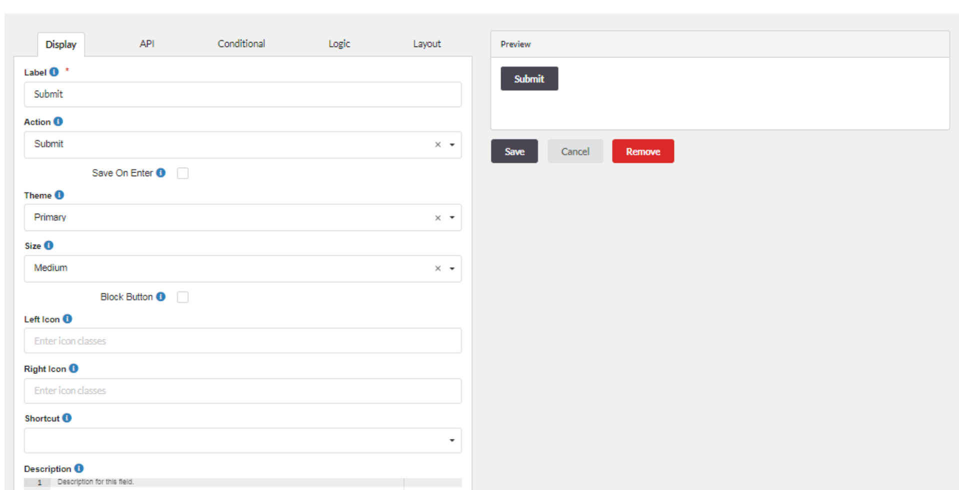


5. Enter the following information:
   - **Form Key**
   - **Form Name**
   - **Description**
6. **Form Design**
   iENT allows you to design forms easily by using a simple drag and drop facility. You can add:

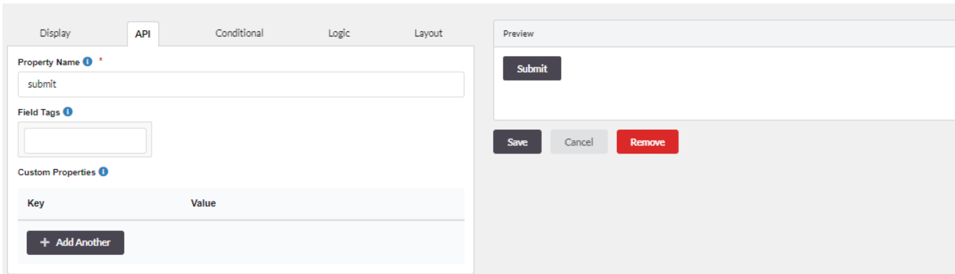


- **Basic** features to your form such as **Text Field**, **Number Field**, **Password**, **Checkbox**, **Button**, etc.
- **Advanced** features **Email**, **Phone Number**, **Date**, **Time**, **Signature**, etc.
- **Layout** features such as **HTML Elements**, **Tables**, **Panels**, **Tabs**, etc.
- **Data** features such as **Containers**, **Data Maps**, **Trees**, etc.
- **Premium** features such as **reCAPTCHA**, **Files**, **Resources**, etc.

7. To use any of these features, drag and drop them to the boxed space on the right. This will open a pop-up to configure the new component that you're adding to the form.



8. Fill in details such as the **Label** under the **Display** tab, and the **Property Name** under the **API** tab.



The property name is used to access the data of your created field. You can use the same API Property ID for common fields across forms for easier data flow.

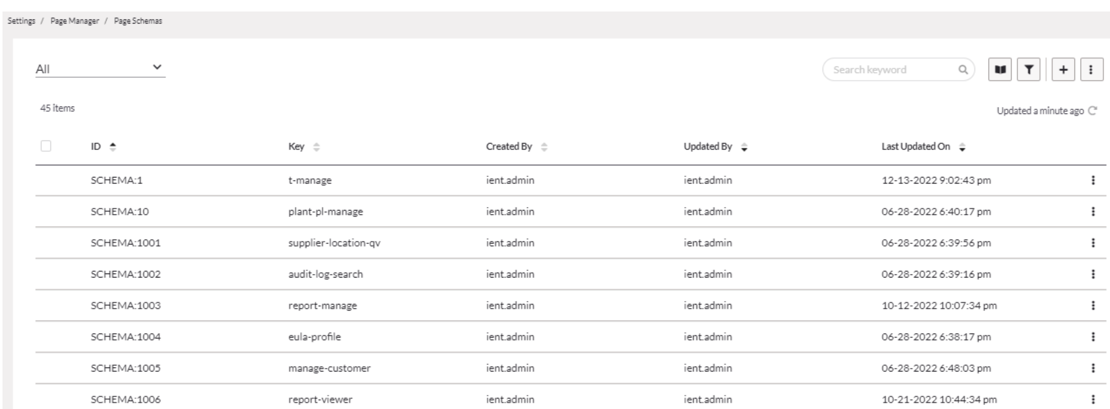
***Note:** See form.io User Guide for more details.*

9. Click **Submit**.

View, Edit and Delete Schemas

To view all your schemas:

1. Log in to the iENT Application.
2. Go to **Settings > Page Manager > Page/Form Schemas**.
   This will display all your existing schemas.

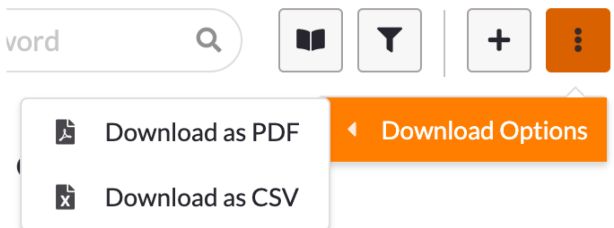


ID	Key	Created By	Updated By	Last Updated On
SCHEMA:1	t-manage	ient.admin	ient.admin	12-13-2022 9:02:43 pm
SCHEMA:10	plant-pl-manage	ient.admin	ient.admin	06-28-2022 6:40:17 pm
SCHEMA:1001	supplier-location-qv	ient.admin	ient.admin	06-28-2022 6:39:56 pm
SCHEMA:1002	audit-log-search	ient.admin	ient.admin	06-28-2022 6:39:16 pm
SCHEMA:1003	report-manage	ient.admin	ient.admin	10-12-2022 10:07:34 pm
SCHEMA:1004	eula-profile	ient.admin	ient.admin	06-28-2022 6:38:17 pm
SCHEMA:1005	manage-customer	ient.admin	ient.admin	06-28-2022 6:48:03 pm
SCHEMA:1006	report-viewer	ient.admin	ient.admin	10-21-2022 10:44:34 pm

- **ID**
- **Key**
- **Created By**
- **Updated By**
- **Last Updated On**

See *here* to explore how you can search, view, sort, and filter all the displayed records

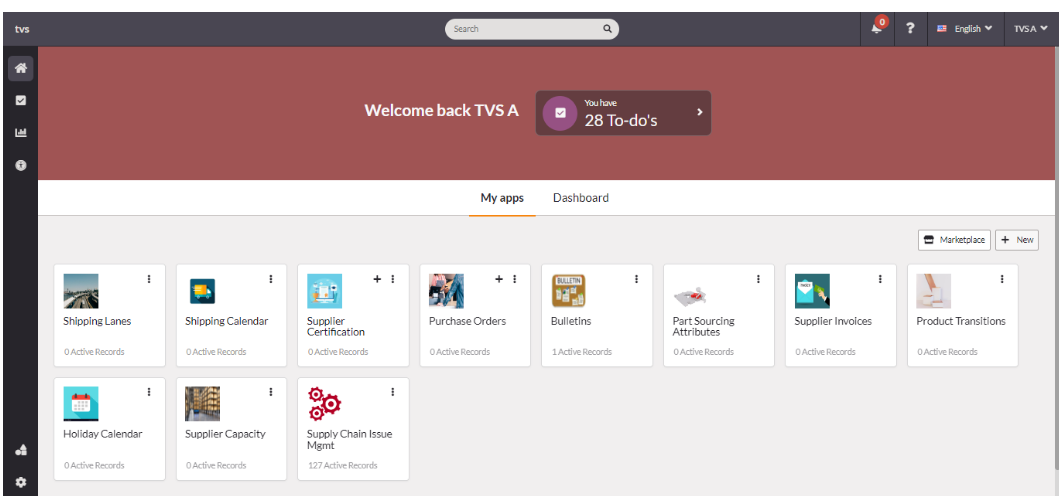
3. To view details of a schema, click on the schema, or select **View** from the kebab menu across your selected schema.
4. To edit details of a schema, select **Edit** from the kebab menu across your selected schema.
   Note: If any field is updated or deleted in the Page Schema, data is to be reentered.
5. To delete a schema, select **Delete** from the kebab menu across your selected schema.
6. Click **Yes** on the confirmation message to confirm the deletion of the schema.
7. To download a list of schemas, select the schemas and then click on the kebab menu on the top right corner of the screen and select **Download Options.** You can download the list of schemas as needed:



   - Download as PDF: Export all the selected records in the data table in PDF format.
   - Download as CSV: Export all the selected records in the data table in CSV format.

Portal Configuration

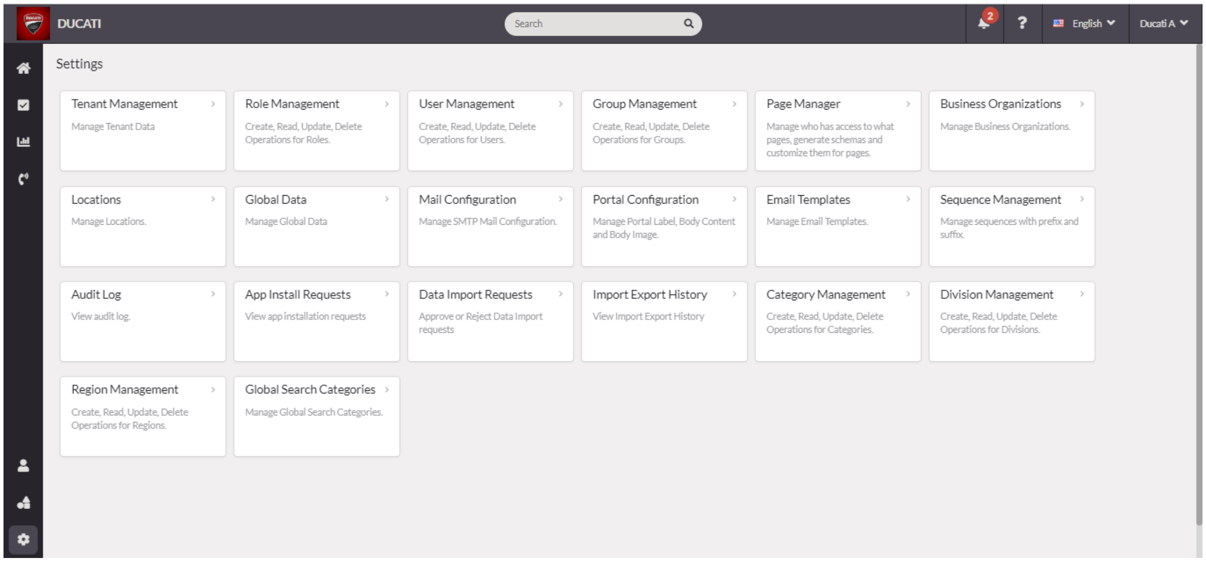
iENT allows a user to customize the portal to tailor the portal's branding to their needs and more links to the navigational toolbar.



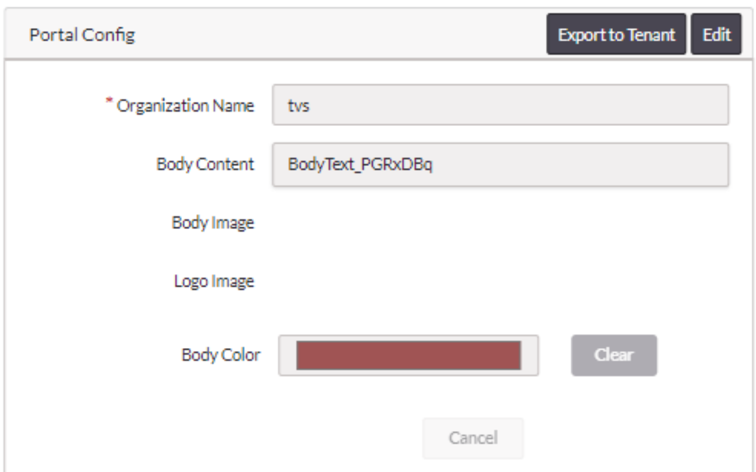
To edit the portal:

1. Log in to the iENT Application.

2. Go to **Settings > Portal Configuration**.



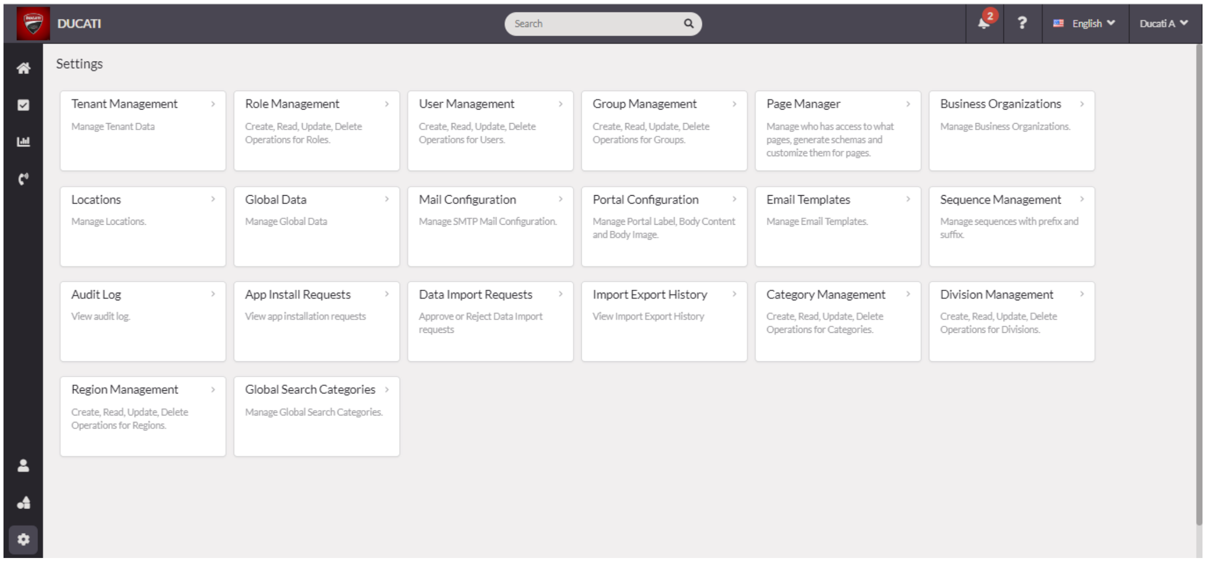
3. Under the **Portal Config** tab, click on **Edit** to be able to make the following changes:



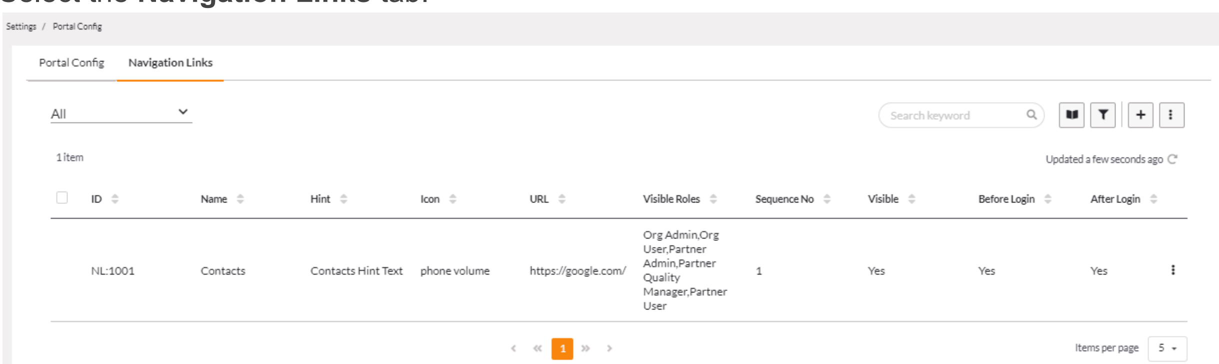
   a. **Organization Name:** This is the name that will be displayed on the top-left corner of the screen to all the users of this organization.
   b. **Body Content:** This is the content that will be displayed on the portal.
   c. **Body Image:** This is the image that will be displayed on the home page.
   d. **Logo Image**
   e. **Body Color**
4. Click on **Submit** to update.
5. You can also click on the **Export to Tenant** button to export portal configuration details to another selected tenant. The selected tenant will have to approve the import request through their account. See here for more details on how to approve data import requests.

You can also add more links to the navigational toolbar in addition to the *homepage*, *Analytics*, *To-do's*, *Project*, and *Settings*. For example, you can add a link to navigate to a contact resource page or a link that covers all the terms and conditions that apply to your organization for all the tenant users to view. To do this:

1. Log in to the iENT Application.
2. Go to **Settings > Portal Configuration**.



3. Select the **Navigation Links** tab.



4. Click on the **+** button to add a new link.
5. Add the following details of the new link:

   - **Name:** The name of the new navigation link.
     Note: This is a mandatory field.
   - **Hint:** This is a short description of the new link.
     Note: This is a mandatory field.
   - **Icon:** Add an icon to display on the navigation toolbar.
   - **URL:** You can add a URL for the link to navigate to.
   - **Visible Roles:** These are all the roles these links will be visible to.

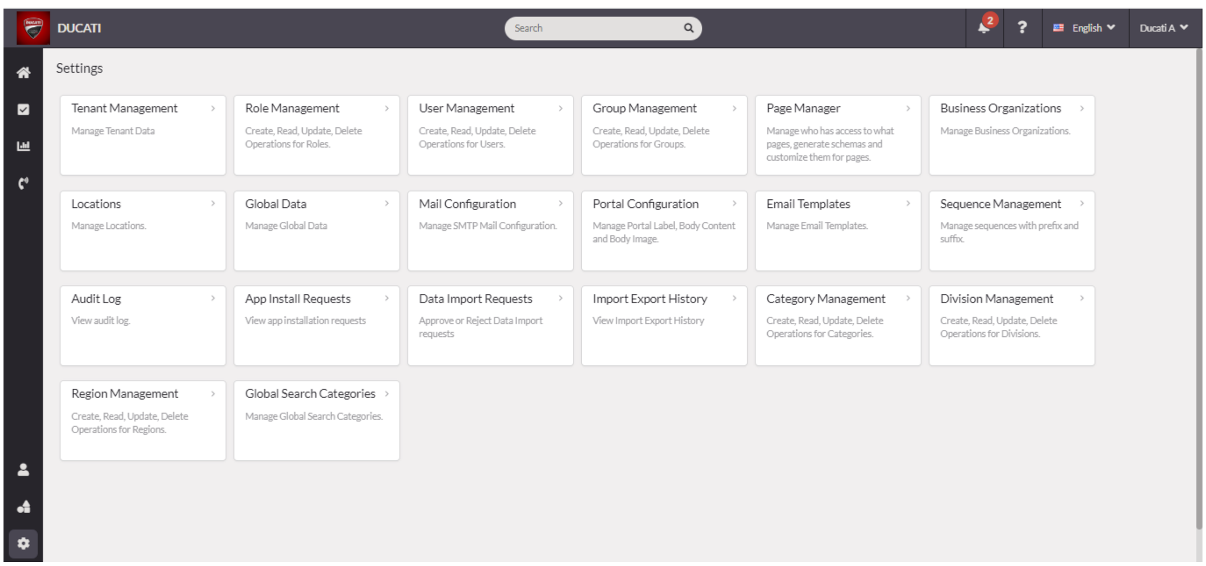
- **Sequence Number:** This is an *integer* value from where the sequence starts. *Note: This is a mandatory field.*
- Check the following boxes:
  - **Visible:** If selected, this will make the link visible on the navigation bar.
  - **Before Login:** If selected, this link will be visible to users before they login.
  - **After Login:** If selected, this link will be visible to users only after they login.

Import Export History

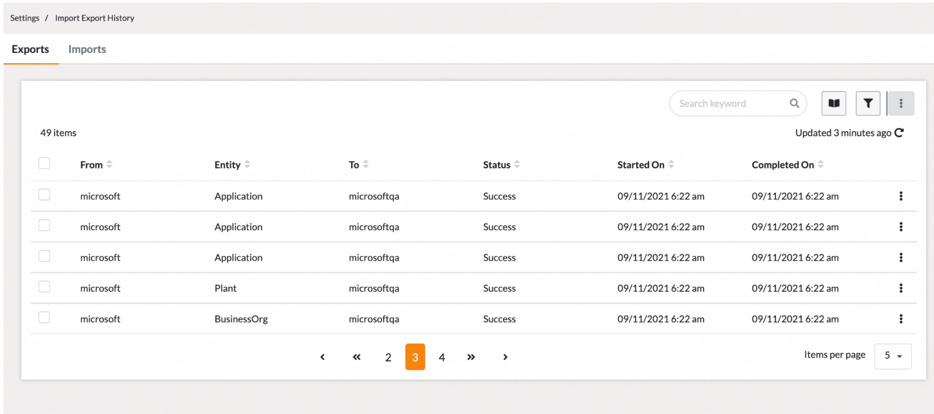
As the Buyer Administrator, you will be able to view all imports and exports made across the application within tenants and users.

To view import and export history:

1. Log in to the iENT Application.
2. Go to **Settings > Import Export History**.



On this page you will be able to view all the following details of imports and exports:



From	Entity	To	Status	Started On	Completed On
microsoft	Application	microsoftqa	Success	09/11/2021 6:22 am	09/11/2021 6:22 am
microsoft	Application	microsoftqa	Success	09/11/2021 6:22 am	09/11/2021 6:22 am
microsoft	Application	microsoftqa	Success	09/11/2021 6:22 am	09/11/2021 6:22 am
microsoft	Plant	microsoftqa	Success	09/11/2021 6:22 am	09/11/2021 6:22 am
microsoft	BusinessOrg	microsoftqa	Success	09/11/2021 6:22 am	09/11/2021 6:22 am

- **From:** The tenant that has exported the data.
- **Entity:** The data entity that has been imported or exported.
- **To:** The tenant that has imported the configuration.
- **Status:** Status of the export/import (*success* or *failed*).
- **Started On:** Date and time of when the import/export started.
- **Complete On:** Date and time of when the import / export ended.

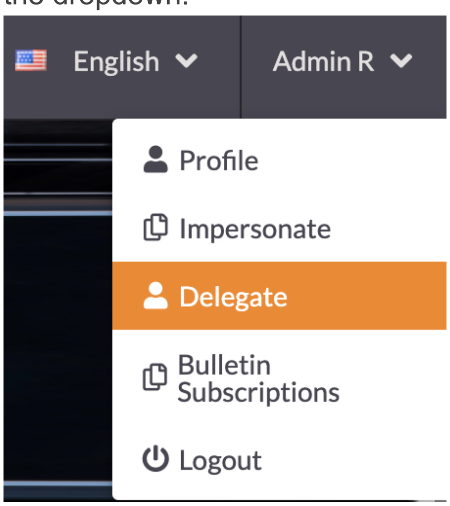
See *here* to explore how you can search, view, sort, and filter all the displayed records.

Delegate

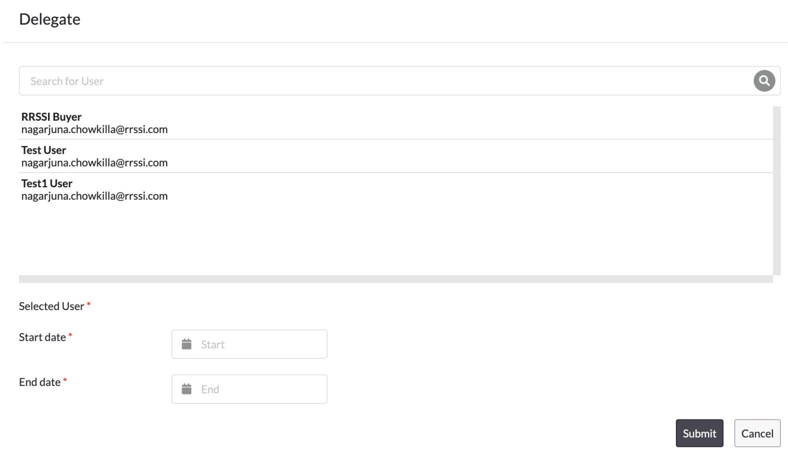
The iENT Application offers users the ability to delegate their functions to another user in their organization. On delegation, the target user will be able to access tasks and perform operations via the relevant applications, accordingly.

To do this:

1. Log in to the iENT Application.
2. Click on your username on the top right corner of the screen and select **Delegate** from the dropdown.



3. From the pop-up, select the following details:



   - **User:** The user you want to delegate to.
   - **Start Date:** The start date from when the user is delegated.
   - **End Date:** The date when the user's delegation ends.
4. Click on **Submit**.

Ariba SSO Configuration

In this section we will follow the steps taken to configure your Ariba SSO login.

1. Create a Service Request with Ariba
   Login to the Ariba support website (*https://support.ariba.com*) and create a service request. The following details are required to create a request:
   - **Service name:** Name of the app link to be displayed in the portal.
     Example: iENT Portal Cloud NA1 QA
   - **Service ID(unique identifier):** ID of the Application service.
     https://<keycloak_base_url>/auth/realms/<realm_name_in _keycloak>
   - **Service Destination URL:** Frontend URL.
     Note: It must be https.
   - **Assertion Consumer Service URL:**
     https://<keycloak_base_url>/auth/realms//<realm_name_in_keycloak>/broker/<identityprovider_alias_in_keycloakrealm>/endpoint/clients/<client_app_name_in_keycloak>
   - **SAML Entity ID:** Entity ID of service provider.
     https://<keycloak_base_url>/auth/realms/<realm_name_in _keycloak>
     - *Note: MetaData / Certificate to be uploaded: Meta data to be downloaded from the Keycloak Identity provider page under the **Endpoints** field.*
   - **Buyer AN ID:** AN ID of Buyer Organization
   - **Supplier AN ID** (Subscribing to this gateway): AN ID of the supplier.
2. Configure the Keycloak client
   a. Create an identity provider for Realm:

        - Navigate to the Realm Page and click on **Identity Provider** on the left navigation bar.
        - Choose *SAML V2.0* from the **Add provider** drop down
        - In the IDP form, enter the alias which is provided in Ariba SR
          Example: aribasnw.
        - Enable *Store Tokens, Stored Tokens Readable, Trust Email* fields
        - Scroll down to the bottom and provide the IDP file shared by the Ariba support team in the *Import from file* field. Click on **Import**.
          Note: In case of any errors while importing, check keycloak logs.
          Common errors found so far are
            - File encoding mismatch.
              Fix: change the XML encoding to UTF-8
            - %s is not valid.
              Fix: remove =%s from the service URL in XML content.
        - Save the IDP form.
    b. Create SAML Client App
        - Navigate to the **Clients** page of the Realm and click on **Create**.
        - Select **SAML** from the **Client Protocol** drop down.
        - Provide the IDP file shared by the Ariba support team through the *Import* field. Click on **Import.**
        - Save the Client creation form.
    c. Configure the SAML client app
        - Enter the client app name in “DP Initiated SSO URL Name” .
          Example: <realmname>-app
        - Under **Fine Grain SAML Endpoint Configuration**
            - Assertion Consumer Service Redirect Binding URL – provide frontend login url.
            - Logout Service POST Binding URL – provide frontend logout url.
3. Test the configuration.

About Us

Founded in 2006, we are a passionate team of technologists and business process experts. We love innovation and get excited to apply technology to business problems. Our offices are spread across California, Texas, Hyderabad and Bangalore. We also partner with a number of organizations in most countries to cover all global regions. With over 15+ years experience in Enterprise software solutions and managing Onshore/offshore delivery, we have a team of 500+ members and are rapidly growing. We are a trusted delivery partner for Global IT needs for companies of all sizes and industries.

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