# IQN Admin Configuration Checklist

Use this checklist to track your progress as you build out the Buyer and Supplier Organization hierarchy in IQNavigator.

| Step | Comment/Tips/Steps | Completed |
| --- | --- | --- |
| Create Enterprise Org | Ensure “FO Time Entry” is correct  Ensure “Don’t Allow Time Entry prior to” setting is correct | http://pptcrafter.files.wordpress.com/2012/03/color-check.png |
| Create Business Rules | Best practice for Enterprise org to have the same settings as the US org |  |
| Create Buyer Org  (Child of Enterprise Org) |  |  |
| Create Business Rules | Best practice for Enterprise org to have the same settings as the US org |  |
| Execute MSA |  |  |
| Execute BSOW | Transaction fees need to be correct  **Note:** If you create a new BSOW, the contract template is deleted so a new one has to be created again.  **Tip:** Take a screenshot of the contract template before you execute the new BSOW. SSOWs must be re-executed once the BSOW has been updated. |  |
| Create Supplier Parent |  |  |
| Create Business Rules for Supplier Parent | Best practice for Supplier Parent org to have the same settings as the actual supplier orgs (child) |  |
| Create MSA for Supplier Parent |  |  |
| Create Supplier Org  (Child of Supplier Parent) | Create a SAR user for each supplier org configured with the following roles:  • Proxy  • Supplier Account Representative  • Supplier Agent  • Supplier Firm Admin  • Supplier Manager  Also **Alternate User Interface** must be set to “No” |  |
| Create Business Rules for Supplier Org |  |  |
| Create MSA for Supplier Org |  |  |
| Create SSOW for Supplier Org | Can create Contract Template before creating SSOW for supplier so info can be copied from SSOW template to actual SSOW for each new supplier org that is added. |  |
| Enable the new UI | Steps:  • Click on your Enterprise Org  • Click on 'policies' configuration button  • Click 'add policy'  • Name: New UI  • Type: UserInterfacePolicy  • Click Create  • Set the following setting to Yes   * Default new users to the alternate UI? * Allow users to be assigned to the alternate UI? * Click Create |  |
| Requisition Set up | * Ensure the Job Requisitions section in the BFP is set up * Ensure the Rates section in the BFP is set up * Update Procurement Workflow settings * Configure CDFs   Copy the Field Label name into the System Identifier field. If you do not want the default text “Please add comments to this field.” Select the type as Free form text then change it back to single text. CDFs should be configured at the enterprise level. Once configured ensure it is activated.   * Create Requisition Layout * Create Assignment Layout   Remove all sections first then start from scratch as this is easier to do than shifting fields around. Do not configure in Mozilla and save every few minutes so you don’t get timed out.  Do not use the following fields –   * Skills * Roles * Certification Credentials * Job Summary/Description – Spell Check * Time Zone * Shift * Estimated Total Spend * Account number (unless AA tells you to!) * Purchase order (unless AA tells you to!)   Add the following CDF for clients where the partner is Volt –   * External Assignment # |  |
| Job Levels and Categories | To deselect categories you must first click on the Select Available Job Categories button |  |
| Job Templates | You have to log into the buyer org to create a job template from the Jobs menu. Once updates are made, you have to click on the Template Summary tab to click the Save Changes button. Also, do not select “My Templates” as this will be a job template only you can use so ensure you select “Buyer Organization Templates list” for the Template Availability field. |  |
| Rate Card Identifiers |  |  |
| Rate Cards |  |  |
| Timecard Template | Create at the buyer org level |  |
| Configure Expense Types |  |  |
| Approval Workflows | If more than one approval workflow is configured the system needs the Approval Workflow field on the Assignment layout to complete in order to create the Assignment. |  |
| Configure Locations | Locations should be loaded at the enterprise level and shared down to the buyer org. |  |
| Over Time Calculation Rules | Standard CA OT rule, CO OT rule and over 40 hours all other location rules should be applied. |  |
| Configure CACs | CAC containers cannot be deleted once they are created, they can only be inactivated. |  |
| Supplier Distribution Lists |  |  |
| Supplier Tiering Rules |  |  |
| Configure Custom Reports | Only configure a few reports in Oscar to show the client what they would look like. In production, configure all custom reports. This needs to be done until the new Analytics tool is rolled out. Create a Reports Admin login at the managing firm level to configure reports. Enable data sources (do not enable Assignment Detail) at the managing firm level first then configure reports by logging in as the login created and going into the reports menu/tab. Ensure you select the orgs the report should be available to. Do the same process for supplier reports but create login/configure reports at supplier parent level. Reports are easier to create in the old UI. |  |
| Load Job Aids/Online Help | Add in system contact at the enterprise level as well as the job aids. |  |
| Load Users | * Standard HMs should have the following roles and should be loaded at the enterprise level:   + Expense Approver   + Express Requisition/Assignment Manager   + Job/WO/EA/Project Approver   + Proxy   + Timecard Approver   + Work Order and Assignment Manager * CAMs should be created at the Managing Firm level and associated in the BFP as a Customer Account Manager on the Enterprise level |  |
| List Configuration | Make changes at the enterprise level as well as the buyer org level |  |
| Onboarding Checklist (optional) |  |  |
| Decision Manager (optional) |  |  |
| Evaluation Template (optional) | Resource Evaluation setting on BFP must be set to Complex to see Template Type Assignment. Template must be searched for in order to show up on the listing page. |  |