# Managing Firm Admin Reference Guide

## System Administration Steps

## Buyer Firm Profile:

1. Log in to IQNavigator using your u*sername* and *password.* If your Home page does not display by default, then select your Organization from the drop-down selection list to continue.
2. Select **accounts** from the **Setup** tab pull-down selection list. A list of Buyer and Supplier Organizations displays for the managing firm you have accessed.
3. Actions you may take from this list include:
   1. View staff (list of system users for an organization).
   2. Create child organization (use to create an organization hierarchy).
   3. Select child organizations (use to re-organize your organization hierarchy).
4. Select the **Organization Name** hyperlink to view and/or edit the organization profile and its business rules.
   1. The following are key items that may be configured in the buyer and supplier organization profiles (select **edit** action to access the editable profile). Note: this is not a complete list of all configurations and all organizations may have some settings specific to that organization profile.
   * Password Expiration Rules
   * Work Order/Assignment Settings
   * Invoice Detail
   * Projects Settings
   * Contractor On-Site Email defaults
   * IVR and Integration Settings
   * Define Customer Account Managers
   * Rate Settings
   * Approval Settings
   * Contractor Time Limits and Match Alerts
   * Job Requisition Settings
   * Locale

The following organization business rules and system features may be configured by selecting the applicable **action** button from the View Account Information screen:

* 1. Approval Workflows – *Please note – approval workflows are maintained through an automated feed process, and should not require manual administration.*
  2. Organization Sub-Class (departments/divisions)
     1. Asset Assignment
     2. Procurement Workflows
     3. Authentication Policies
     4. Rate Card Identifiers
     5. Bonus Processing
     6. Rate Card
     7. Collaboration Visibility
     8. Rate Identifiers
  3. Configure Screen – ability to change the display order of customer defined fields
     1. Reason Codes
  4. Cost Invoice Details (discussed in the Manage Cost Allocation Codes section below)
     1. Services Identifiers
  5. Custom Labels
  6. Services Rate Table
  7. Customer Defined Fields – will be enabled, but recommend not changing; contact IQN support for maintenance needs
     1. Shift Configuration
     2. Dashboard Configurations
  8. Supplier Tiering (discussed in the View/Manage Suppliers section below)
     1. List Configuration
     2. Timecard Templates
     3. Load External Data
     4. Units of Measure
     5. Notifications
     6. Contract Templates
     7. On-Boarding Checklist
     8. Users

Follow the prompts to make edits/changes and remember to **save changes** to save your edits/changes.

Users will be prompted to change passwords every 90 days for heightened security.

## Manage Users:

1. Select **view staff** actionfor the particular buyer or supplier organization within the organization list (**Accounts** screen). A list of system users for this organization will appear.
2. Select the **create worker** action to create a new user account.
3. To update existing users, select **configure account** action associated to an individual user within the list. The following fields may be updated:
   1. **Create Password / Change Password**
   2. **Disable User Login**
   3. **Assign System Role(s)**
   4. **Assign Locale**
   5. **Set Default Approval Workflow**
   6. **Set Dashboard Configuration**
   7. **Designate a ‘Reports To’ user** (used for automatic approval workflow routing)

## View/Manage Suppliers:

*To view the suppliers’ setup in a buyer organization’s marketplace:*

1. A user with the Buyer Firm Admin role may simply select **supplier organizations** from the **My Company Info** tab.
   1. Select the Supplier Organization name link to view the supplier profile.
2. A user with the Managing Firm Admin role can view the list of **Supplier SOW’s** from within the **Buyer Firm Profile** screen.

*To create a new supplier setup for a buyer organization’s marketplace:*

Only a Managing Firm Admin role can do this by:

* 1. Selecting the **edit** action to edit the **Buyer Firm Profile.**
  2. **Adding** a new supplier name in the **Supplier Organization Service Agreements** section at the bottom of the screen.
  3. Selecting **save** action to save the buyer firm profile.
  4. Then selecting **add version** action next to the supplier name in the Buyer Firm Profile (read-only view) in the **Buyer/Supplier Agreements** section.

*To view, edit, or create supplier distribution lists available to all users in this organization, select* ***distribution lists*** *from the* ***Your Profile*** *tab.*

1. Create new distribution lists by selecting the **create organization distribution list** button.
2. **Edit** or **delete** a list from within the list screen or by selecting the list name link.
3. You must check the box to make this list available to managers on the requisition (if that applies).

*To view or maintain Supplier Tiering rules, select s****upplier organization tiering*** *from the* ***My Company Info*** *tab.*

1. Create new supplier tiering rule by selecting **create tiering rules** button.
2. **Edit**, **delete, or activate/inactivate** a rule from within the list screen actions.

## Create/Maintain Job Templates:

The following steps may be taken to create company-wide job templates which are critical for express requisitioning and rate card functionality. Note: a user with the Managing Firm Admin role alone cannot create templates; rather the user must also have the Buyer Firm Admin or CAM (Client Account Manager) role.

1. Select **job templates** from the **Jobs** tab.The job template list will default to Buyer Organization Job Templates – these are organization-shared templates.
2. Select the **Job Title** link to view or edit an existing job template.
3. Select **create template** action to create a new job template.
   1. Be sure to specify two *critical* items:
      1. The applicable procurement workflow for requisition type (Staff Aug or Temp)
      2. Whether this template is available to Rate Cards or not
   2. Specify all applicable information that should default on requisitions for this job type.
4. Select **clone** action on an existing template to create a copy of that template and modify it as a new job template.

## Manage Rate Cards:

Rate cards provide the ability to establish and maintain a set of agreed upon bill rates, mark-ups, and pay-rates pre-negotiated between your buyer organizations and their suppliers based on pre-defined criteria (e.g., job title, supplier, customer-defined rate card identifier).

***You have the ability to manage your rate cards, but we encourage you to utilize IQN support and further training to assist you in this process due to significant system impacts with these administrative changes.***

1. If a new job template has been created, contact IQN support with the Template Name, Supplier Distribution, and the pre-negotiated Rates and Mark Up associated to this job type and IQN will create the rate card.
2. To view the existing Rate Card table containing pre-negotiated rates with suppliers, select **rate cards** from within the **Buyer Firm Profile**.
3. You may **edit** or **inactivate** existing rate cards by selecting the appropriate action to the applicable rate card in the table.
4. Select **create new** to create a new rate card. Please note a given Job Title/Supplier Organization combination may only appear on one active rate card, the system will prohibit you from creating a duplicate and you will need to edit the existing rate card.
5. You may also edit, delete, or create new rate card identifiers by selecting **rate card identifiers** from within the **Buyer Firm Profile**.

Manage Cost Allocation Codes:

Cost Allocation Codes (CAC) can be maintained through a CAC load process or manually updated in the system:

1. To view/maintain CAC values and business rules, select **cost/invoice details** actions button in the **Buyer Firm Profile** screen.
2. Change the business rules via this screen by selecting **edit** in the **Segment Properties** row of the CAC1/CAC2 sections to define CAC properties, and/or selecting **edit** in the **CAC Values** row of the CAC1/CAC2 sections to edit or disable existing CAC values and to add new ones.