



System Administration

User Guide

V3.0

Table of Contents

1.0.	Module Overview	4
2.0.	Using the Module.....	5
2.1.	Users.....	5
2.1.1.	SAM Filter and Search	5
2.1.2.	Navigation Tree.....	7
2.1.3.	User List Summary Table	9
2.1.4.	User Details.....	10
2.1.5.	Edit User Information and User Module Access	12
2.1.6.	Add a New User.....	16
2.1.7.	View Company Info	17
2.1.8.	Login Policies	18
2.2.	Data Maintenance.....	19
2.2.1.	Terminology	19
2.2.2.	Default User Groups (DUG) – Data Maintenance	22
2.2.3.	Departments - Data Maintenance	24
2.2.4.	Approval Settings - Data Maintenance	28

Figures

Figure 1:	SAM Default Page	5
Figure 2:	Definition of Terms Used in the SAM Filter: Basic Search Mode	5
Figure 3:	SAM Filter: Advanced Search.....	6
Figure 4:	Navigation Tree.....	8
Figure 5:	User List Details Preview	11
Figure 6:	Collapse/Expand Top Pane	11
Figure 7:	User Information	12
Figure 8:	User Module Access.....	12
Figure 9:	Edit Button in User Information.....	13
Figure 10:	Edit User Information	13
Figure 11:	Reset Password Button	14
Figure 12:	Confirmation Box	14
Figure 13:	User Module Access Edit Buttons	14
Figure 14:	Edit User Module Access.....	15
Figure 15:	Assigning Module Admin Name.....	15
Figure 16:	User Access Module Saving Buttons	15
Figure 17:	Add New User.....	16
Figure 18:	Set Module Access	16
Figure 19:	Company Information Details	18
Figure 20:	Change Login Policies	19
Figure 21:	AS Basic Search Mode.....	23
Figure 22:	AS Advanced Search Mode.....	23
Figure 23:	DUG Summary Table.....	23

Figure 24: View Details	24
Figure 25: Department List.....	25
Figure 26: Add Department.....	25
Figure 27: Edit Department.....	26
Figure 28: Delete Department.....	27
Figure 29: Refresh Category List	27
Figure 30: AS Basic Search Mode.....	28
Figure 31: AS Advanced Search Mode.....	28
Figure 32: AS Summary Table.....	28
Figure 33: View Details	29

Tables

Table 1: Definition of Terms Used in the SAM Filter: Basic Search Mode	6
Table 2: Definition of Terms Used in the SAM Filter: Advanced Search Mode	6
Table 3: Summary Table Terminology.....	9
Table 4: Fields in User Information Page.....	11
Table 5: Fields in User Module Access.....	12
Table 6: Fields in Company Information Page.....	17
Table 7: Fields in Login Policies Page.....	19
Table 8: Fields in Data Maintenance	22

1.0. Module Overview

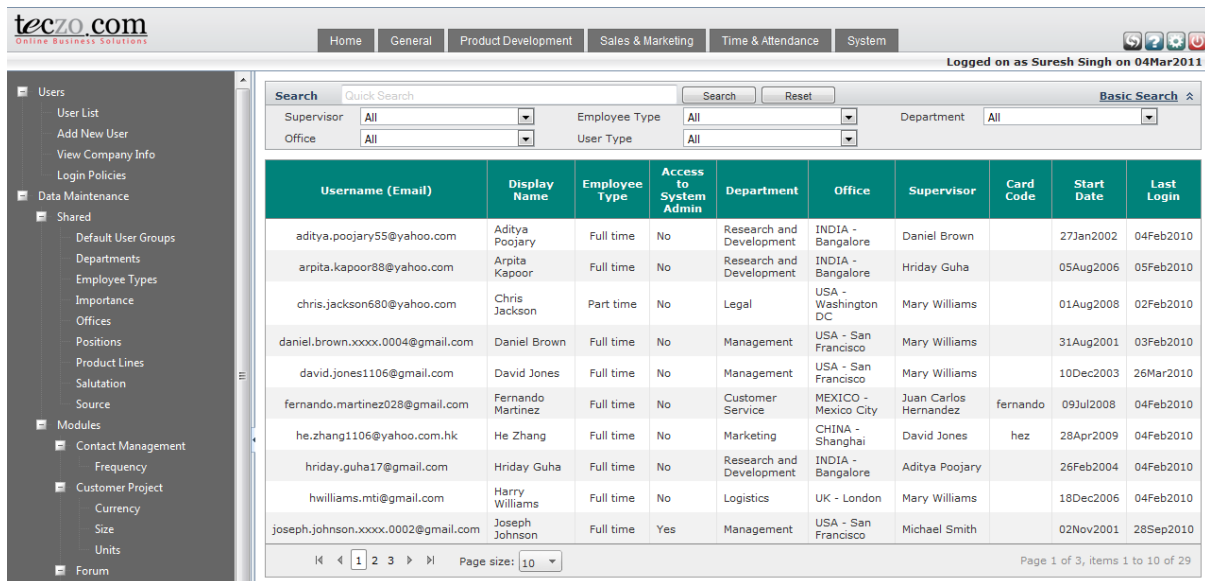
The System Administration module (SAM) is the core of Teczo Online Business Solutions. This is used to maintain the modules that a company has subscribed to; and to manage all the user accounts of the company. The module is intended to be used by system administrators.

SAM is only accessible by the company administrator and the system administrators and its corresponding link in the system menu is disabled for other users. The assigned company administrator should be granted with full access to its company account in Teczo, including SAM and can assign other users to be included in the system administrator list. The company administrator can manipulate all the subordinate system administrators and ordinary users while a system administrator can only manipulate ordinary users, but not any other system administrator.

2.0. Using the Module

2.1. Users

Upon clicking the System Administration link in the Teczo home page, the user will be directed to the SAM Default Page which is composed mainly of Filter, Navigation Tree and User List Summary Table.



The screenshot shows the SAM Default Page interface. On the left is a navigation tree with categories like Users, Data Maintenance, Shared, and Modules. The main area displays a search filter and a table of users. The search filter includes dropdowns for Supervisor, Employee Type, Department, Office, and User Type, along with Search and Reset buttons. The table below lists user details.

Username (Email)	Display Name	Employee Type	Access to System Admin	Department	Office	Supervisor	Card Code	Start Date	Last Login
aditya.poojary55@yahoo.com	Aditya Poojary	Full time	No	Research and Development	INDIA - Bangalore	Daniel Brown		27Jan2002	04Feb2010
arpita.kapoor88@yahoo.com	Arpita Kapoor	Full time	No	Research and Development	INDIA - Bangalore	Hriday Guha		05Aug2006	05Feb2010
chris-jackson680@yahoo.com	Chris Jackson	Part time	No	Legal	USA - Washington DC	Mary Williams		01Aug2008	02Feb2010
daniel.brown.xxxx.0004@gmail.com	Daniel Brown	Full time	No	Management	USA - San Francisco	Mary Williams		31Aug2001	03Feb2010
david.jones1106@gmail.com	David Jones	Full time	No	Management	USA - San Francisco	Mary Williams		10Dec2003	26Mar2010
fernando.martinez028@gmail.com	Fernando Martinez	Full time	No	Customer Service	MEXICO - Mexico City	Juan Carlos Hernandez	fernando	09Jul2008	04Feb2010
he.zhang1106@yahoo.com.hk	He Zhang	Full time	No	Marketing	CHINA - Shanghai	David Jones	hez	28Apr2009	04Feb2010
hriday.guha17@gmail.com	Hriday Guha	Full time	No	Research and Development	INDIA - Bangalore	Aditya Poojary		26Feb2004	04Feb2010
hwilliams.mti@gmail.com	Harry Williams	Full time	No	Logistics	UK - London	Mary Williams		18Dec2006	04Feb2010
joseph.johnson.xxxx.0002@gmail.com	Joseph Johnson	Full time	Yes	Management	USA - San Francisco	Michael Smith		02Nov2001	28Sep2010

Figure 1: SAM Default Page

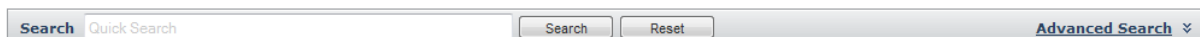
2.1.1. SAM Filter and Search

This section contains a filter, allowing users to view or search for specific users. There are two Filter modes: Basic (default filter) and Advanced. The user simply clicks on the Basic/Advanced Search links to switch modes.

The Basic Search enables the user to look for records by supplying certain keywords. The user list summary page will load with the Basic Search mode on default.

The Advanced Search provides the user with more choices to select from, ensuring a more precise search.

A. Basic Search Mode



The screenshot shows the search filter interface in Basic Search Mode. It includes a search bar with the text 'Quick Search', 'Search' and 'Reset' buttons, and a link for 'Advanced Search'.

Figure 2: Definition of Terms Used in the SAM Filter: Basic Search Mode

TERM	DEFINITION
Any Field Contains	Allows the user to enter keywords of any character string, except date type to be searched.

Table 1: Definition of Terms Used in the SAM Filter: Basic Search Mode

1. Fill in the Any Field Contains box to search for records with specific strings or words.
2. Click Search to search and filter.
3. Click Reset to remove your input.

B. Advanced Search

Figure 3: SAM Filter: Advanced Search

TERM	DEFINITION
Supervisor	Indicates the names of the company supervisors. (Default Value: All)
Office	Indicates the company office locations. (Default Value: All)
Employee Type	Indicates the types of employees in the company. (Default Value: All)
User Type	Indicates the user access type. Values: (Default Value: All) <ul style="list-style-type: none"> • System Admin • User
Department	Indicates the company departments. (Default Value: All)

Table 2: Definition of Terms Used in the SAM Filter: Advanced Search Mode

1. Fill in the field box of Any Field Contains to search for records with specific strings or words.
2. Select from the dropdown list of the desired fields to filter the records.
3. Click Search to search and filter.
4. Click Rest to reset selected field values and return its default values from the search fields and the summary table.

2.1.2. Navigation Tree

The Navigation Tree, which is composed of the Users and Data Maintenance can be found at the left side of the page. It can be hidden or shown by clicking the collapse/expand

Located at the left side of the page, the navigation tree is composed of Users and Data Maintenance. It can be hidden or shown by clicking the collapse/expand the left pane button. The tree width can also be increased or decreased.

A. Users - where system administrator can view and manage user profiles.

1. **User List:** It allows the system administrator to view user list, user details and user's module access setting, to search for a specific user or a set of users, to reset user password, to edit user information and user's module access setting.
2. **Add New User:** It allows the system administrator to add users and set module access.
3. **View Company Info:** It allows the system administrator to view the detailed information and disk quota usage status of his/her organization and purchase extra storage through this page.
4. **Login Policies:** It allows the system administrator to set login policies for their organization.

B. Data Maintenance - where a system administrator can maintain shared data such as category and department and data for specific modules.

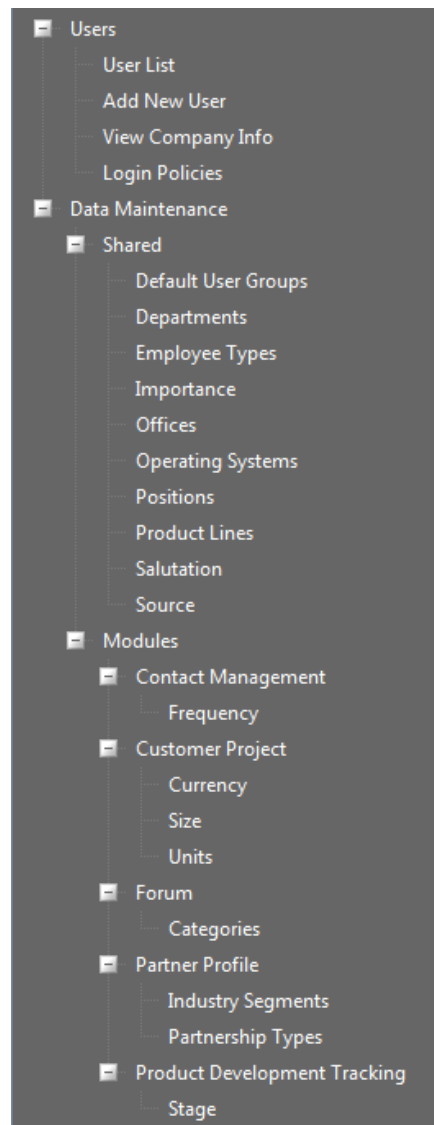


Figure 4: *Navigation Tree*

2.1.3. User List Summary Table

The system administrator can view the list of users in User List.

A. Terminology

The table explains terms used in SAM Summary Table.

TERMS	DEFINITION
Username (Email)	User's unique email address
Full Name	Combined given and family name of the user, e.g. Jack Smith
Employee Type	Employment status
Access to System Admin	Yes or No access of user in the system administration module
Department	The name of the department which the user belongs to
Office	The name of the office which the user belongs to
Supervisor	The person the user directly reports to
Card Code	The code of the user's clocking card for the time and attendance system
Start Date	Date when the user joins the company, e.g. 22Jul2007
Last Login	Date when the user is last logged in to Teczo, e.g. 22Jul2007

Table 3: Summary Table Terminology

B. User List Summary Table

The User List is the default page of SAM. To see other pages, navigate to the left side navigation tree.

2.1.4. User Details

The system administrator can view and edit the detailed information of ordinary users. They can also view the information of other system administrators, but cannot edit their information.

A. Terminology

The table contains the description of terms used for viewing user details:

TERMS	DESCRIPTION
Usercode	Displays the system-generated code for the user
Salutation	Shows the user's salutation
Given Name	Displays the user's First Name. Note: Middle name is part of the given name.
Family Name	Displays the user's Last Name
Username (Email)	Displays the user's unique email address
Office	Shows the office location of the user
Department	Displays the company department of the user
Position	Displays the job position of the user
Supervisor	Displays the supervisor name of the user
Home Phone	Displays the home phone number of the user
Office Phone	Indicates the user's office phone number
Mobile	Indicates the user's mobile number
Address	Indicates the user's home address
Zip/Postal Code	Indicates the user's zip code
User Type	Indicates the access type of the user Values: <ul style="list-style-type: none"> • System Admin • User
Employee Type	Shows the user's employment status
Start Date	Indicates the date when the user joins the company, e.g. 22Jul2007
End Date	Indicates the date when the user leaves the company, e.g. 22Jun2008

TERMS	DESCRIPTION
State	Indicates the state of the user which may be Active (AC), Inactive (IN) or Suspended (SU)

Table 4: Fields in User Information Page

B. View User Details

1. Click on a record to display complete details of the user.

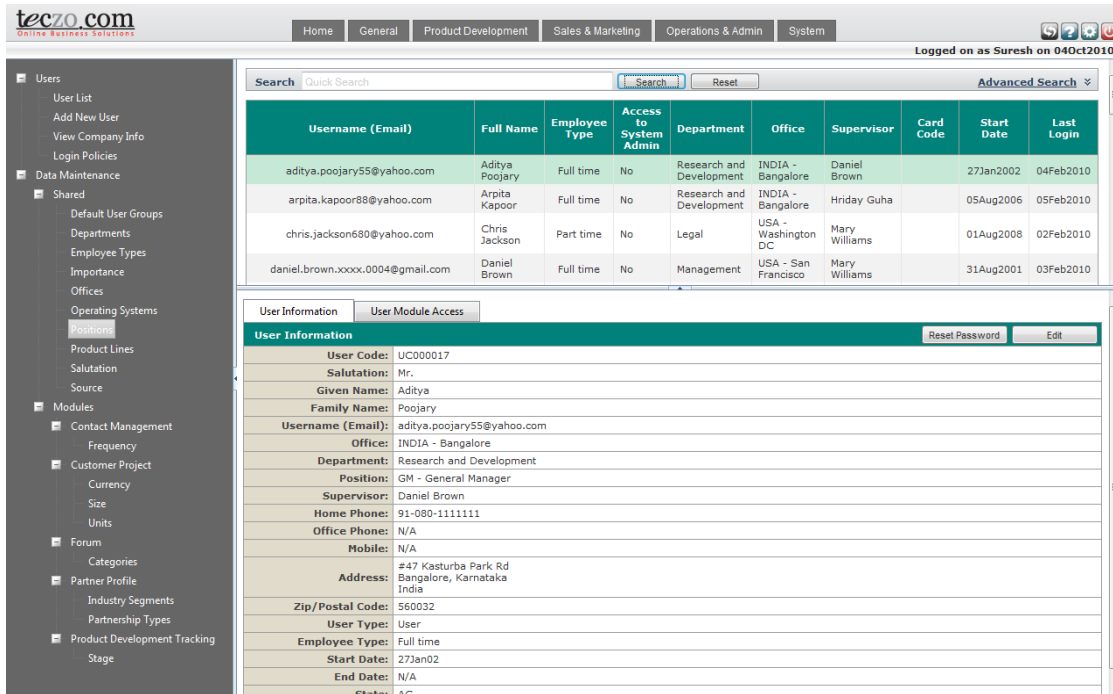


Figure 5: User List Details Preview

2. User has an option to hide or display the user list above the user details by clicking the collapse/expand the top pane button. The height of the user details can also be increased or decreased.

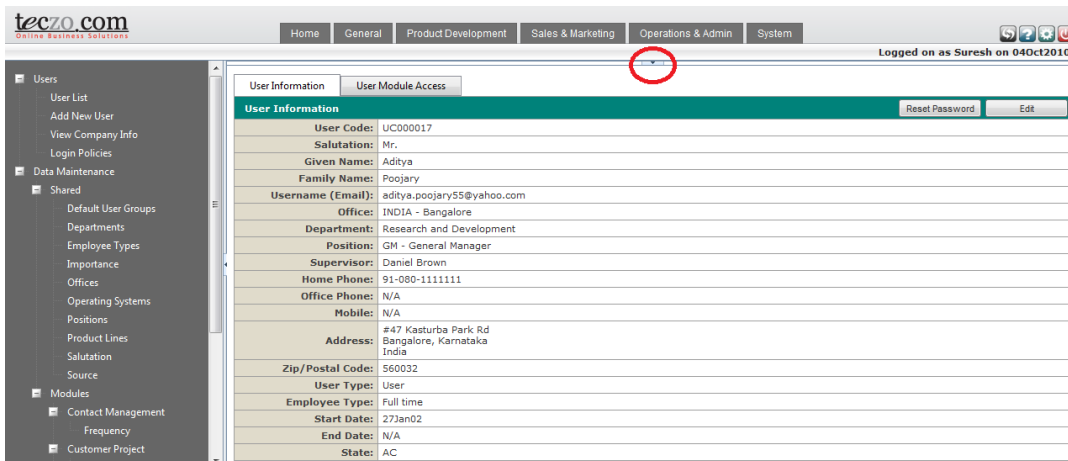


Figure 6: Collapse/Expand Top Pane

C. Division of User Details

1. User Details is divided into two parts – User Information and User Module Access.
2. User Information shows the detailed information of the user.

User Information		Reset Password	Edit
User Code:	UC000017		
Salutation:	Mr.		
Given Name:	Aditya		
Family Name:	Poojary		
Username (Email):	aditya.poojary55@yahoo.com		
Office:	INDIA - Bangalore		
Department:	Research and Development		
Position:	GM - General Manager		
Supervisor:	Daniel Brown		
Home Phone:	91-080-1111111		
Office Phone:	N/A		
Mobile:	N/A		
Address:	#47 Kasturba Park Rd Bangalore, Karnataka India		
Zip/Postal Code:	560032		
User Type:	User		
Employee Type:	Full time		
Start Date:	27Jan02		
End Date:	N/A		
State:	AC		

Figure 7: User Information

3. User Module Access displays the user's access rights to each module.

User Module Access					Edit
	Module	Admin	Read	Write	
▼					
	Actions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Announcement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Bug Tracker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Contact Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Customer Projects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Forum	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Product Development Tracking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Partner Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Time And Attendance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Technical Support Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 8: User Module Access

2.1.5. Edit User Information and User Module Access

The system administrator can edit all the fields except User Type as well as resetting the password of the user in the User Information part and edit the access rights of the user in the User Module Access tab. *Note: Only the company administrator can edit the User Type field.*

A. Terminology

The table below explains terms used for module access setting:

TERMS	DEFINITION
Admin	Users are given access to SAM. Able view all the records in SAM and edit users details.
Read	Users are given only the right to view records in the given modules.
Write	Users are given access to the given modules and may participate in adding and editing records. Enabling read will automatically enable write.

Table 5: Fields in User Module Access

B. Edit User Information

1. The system admin can go to the edit page by clicking the Edit button from the user information details part.

User Information	User Module Access
User Information	
Reset Password Edit	
User Code:	UC000017
Salutation:	Mr.
Given Name:	Aditya
Family Name:	Poojary
Username (Email):	aditya.poojary55@yahoo.com
Office:	INDIA - Bangalore

Figure 9: Edit Button in User Information

2. System admin can edit all the fields indicated in the Edit details page.

Edit User Information	
Status:	<input checked="" type="radio"/> Active <input type="radio"/> Suspended* <input type="radio"/> Inactive* <small>* Suspended users will still be available for selection in filters/user lists/ access rights lists. Inactive users will not be.</small>
User Code:	UC000017
Username (Email):	aditya.poojary55@yahoo.com
Employee Type:	Full time
Salutation:	Mr.
Start Date:	27Jan2002
Given Name:	Aditya
End Date:	
Family Name:	Poojary
Home Phone:	91-080-1111111
Office:	INDIA - Bangalore
Office Phone:	
Department:	Research and Development
Mobile:	
Position:	GM - General Manager
Supervisor:	Daniel Brown
Address:	#47 Kasturba Park Rd Bangalore, Karnataka India You have 200 characters remaining
Zip/Postal Code:	560032
<input type="button" value="Save"/> <input type="button" value="Save & Close"/> <input type="button" value="Reset"/> <input type="button" value="Back"/>	

Figure 10: Edit User Information

3. After editing the desired fields, the system administrator has the option to Save, Save & Close, Reset and Back.

C. Changing User Status

There are three types of user status: Active, Suspended and Inactive. Changing status from one to another will affect their access to Teczo and visibility of their names in the user lists e.g. access rights lists, dropdown list and filters.

1. Active – allowed access Teczo and names are available in the user lists in the modules they have access to.
2. Suspended – not allowed to access Teczo but their names are available in all user lists.
3. Inactive – not allowed to access Teczo and names will not be available in all user lists.

D. Reset a Password

The system admin can set a new password for any ordinary user in the User Information tab.

1. Click the Reset Password button located at the upper right corner of the User Information page.

User Information	User Module Access
User Information	
User Code:	UC000017
Salutation:	Mr.
Given Name:	Aditya
Family Name:	Poojary
Username (Email):	aditya.poojary55@yahoo.com
Office:	INDIA - Bangalore
Department:	Research and Development
Position:	GM - General Manager
Supervisor:	Daniel Brown
Home Phone:	91-080-1111111
Office Phone:	N/A

Figure 11: Reset Password Button

- Click Ok button in the popup confirmation box.

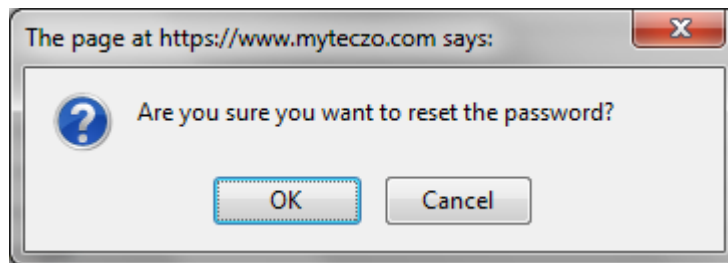


Figure 12: Confirmation Box

- After the successful reset, an email with the new password will automatically be sent to the user.

E. Edit User Module Access

The system admin can edit or change the user access rights of the users.

- Click the Edit button located at the right upper corner of the User Module Access tab.

User Information	User Module Access		
User Module Access			
Module	Admin	Read	Write
Actions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Announcement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bug Tracker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Projects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forum	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Product Development Tracking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Time And Attendance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Technical Support Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 13: User Module Access Edit Buttons

- System admin can assign the user to be a module administrator of any available modules by checking one or more checkboxes below the Module Administration Rights column. Module Admin rights gives the user rights to access all the items in the specific modules via Transformation link (see Teczo Essential Feature User Guide). *Note: Assigning module administrator automatically gives read, write and edit access to the user on the selected modules.*

User Module Access : Aditya Poojary				
Module	Module Administration Rights* (<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write <input checked="" type="checkbox"/> Edit)	Read	Write	
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
General				
Actions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Announcement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Forum	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Operations, HR, Finance				
Time And Attendance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Product Development				
Bug Tracker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Product Development Tracking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Technical Support Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sales and Marketing				
Customer Projects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Partner Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 14: Edit User Module Access

- Upon clicking either all or specific module in the module administration rights column, the system admin will be required to assign module admin name for the selected user.

Technical Support Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales and Marketing			
Customer Projects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You have given this user Module Administration rights to at least one module. Please provide a Module Administrator name:

Module Admin

Figure 15: Assigning Module Admin Name

- System Administrator has the option to Save, Save & Close, Reset and Back.

User Module Access : Aditya Poojary				
Module	Module Administration Rights* (<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write <input checked="" type="checkbox"/> Edit)	Read	Write	
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
General				
Actions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Announcement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contact Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Forum	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Operations, HR, Finance				
Time And Attendance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Product Development				
Bug Tracker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Product Development Tracking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Technical Support Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sales and Marketing				
Customer Projects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Partner Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 16: User Access Module Saving Buttons

2.1.6. Add a New User

- A. System Administrator can add new user by navigating to the Add New User under Users through the Navigation Tree.

The screenshot shows the 'Add New User' form in Step 1. The form is divided into two columns. The left column contains fields for Username (Email), Salutation, Given Name, Family Name, Office, Department, Position, and Supervisor. The right column contains fields for Employee Type, User Type, Start Date, End Date, Home Phone, Office Phone, and Mobile. The Address field is a large text area at the bottom. The Address field has a character count: 'You have 200 characters remaining'. The form has a 'Back' button, a 'Reset' button, and a 'Next' button at the bottom.

Figure 17: Add New User

- B. System Administrator will be directed to Add New User page. Fill in the fields, boxes highlighted in yellow are the required fields.
- C. Click Next to set module access for the user.

The screenshot shows the 'Set Module Access' form in Step 2. The form has a title 'System Administration Rights' and a question: 'Give this user System Administration rights so he/she can access System Administration?' with 'Yes' and 'No' radio buttons. The 'No' button is selected. Below the question are two notes: 'Notes: Only the Company Administrator can edit this setting.' and 'Users with access rights to System Administration can change this company account's settings, including the adding or editing of users'. Below the notes is a table titled 'Individual Module Access Rights'.

Module	Module Administration Rights* (<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write <input type="checkbox"/> Edit)	Read	Write
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General			
Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Announcement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Link Directories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Library	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Calendars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Repositories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard Operation Procedures (SOP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operations, HR, Finance			
Product Development			
Sales and Marketing			
Channel Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer's Successes Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forecast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VIP Forum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the form are buttons: Previous, Save, Save & Close, Reset, and Back.

Figure 18: Set Module Access

Note: System Administration Rights selection is only visible to Company Administrator. System Admin can only add ordinary user and assign module administrator.

- D. System Admin have the options to Save, Save and Close, Reset, Back to return to the previous page.

2.1.7. View Company Info

The system administrator can view the detailed information and disk quota usage status of his/her organization and purchase extra storage through this page.

A. Terminology

The table below explains terms used for company details:

TERMS	DEFINITION
Company Name	Name of the company, e.g. MP3 Thumb, Inc.
Industry	Nature of Business of the company, e.g. IT and Electronics
Contact Person	Contact person's full name which is composed of given name and family name, e.g. David Jones
Contact No.	Telephone number of the contact person
Email	Email Address of Contact person, e.g. sales@teczo.com
Address	Office address of the company
Country	Full Country name of the company's office
Date Subscribed	Date when a company subscribes to Teczo e.g. 04Nov09
Usage Status	Disk quota usage status of the system administrator's organization
Get Extra Storage	The system administrator can purchase extra storage if necessary.

Table 6: *Fields in Company Information Page*

B. View Company Details

1. Navigate to View Company Info under Users in the navigation tree.
2. System Administrator will be directed to the Company Information details page.

Note: Company information can only be edited by the Super Administrator of Teczo.com.

Company Information	
Company Name:	MP3 Thumb, INC.
Industry:	IT and Electronics
Contact Person:	David Jones
Contact No.:	415-000-0000
Email:	sales@teczo.com
Address:	1234 Teczo Drive, San Francisco, CA94101
Country:	United States
Date Subscribed:	04Nov09


Disk Quota Usage	
Usage Status:	 (3.52 MB / 10 MB) You are currently using 35.23% of your disk quota.
Get Extra Storage:	200 MB <input type="button" value="Purchase now"/>

Figure 19: Company Information Details

C. Get Extra Storage

1. Select a storage size from the Get Extra Storage dropdown list.
2. Click Purchase now and the system administrator will be redirected to the Get Teczo page of Teczo.com's official website.

2.1.8. Login Policies

The system administrator can define login policies for his/her organization to enhance security by encouraging users to employ strong passwords and use them properly.

A. Terminology

The table contains the description of terms used for login policies:

TERMS	DESCRIPTION
Password Expiration	Password duration Values: <i>(Default Value: 90 days)</i> <ul style="list-style-type: none"> • 7 days • 14 days • 30 days • 60 days • 90 days • 180 days • One year • Never expires
Password History	Newly entered password will be rejected if it is the same as the remembered passwords. Values: <i>(Default Value: 3 passwords remembered)</i> <ul style="list-style-type: none"> • No passwords remembered • 3 passwords remembered • 5 passwords remembered
Password Length	Minimum password length Values: <i>(Default Value: 8 characters)</i> <ul style="list-style-type: none"> • 8 characters • 10 characters • 12 characters

TERMS	DESCRIPTION
Password Strength	<p>A measure of effectiveness of a password in resisting guessing and brute-force attacks.</p> <p>Values: (Default Value: Accept average and above)</p> <ul style="list-style-type: none"> Accept weak and above Accept average and above Accept only strong and excellent
Login Attempts	<p>Maximum invalid login attempts</p> <p>Values: (Default Value: 5 attempts)</p> <ul style="list-style-type: none"> 3 attempts 5 attempts 10 attempts No limit <p>Capcha will appear after the selected number of invalid attempts.</p>

Table 7: Fields in Login Policies Page

B. Change Login Policy

1. Change any login policy by selecting a value from a field.
2. Click Save to save the changes.

Login Policies	
Password Expiration:	7 days
Password History:	<input type="radio"/> No passwords remembered <input type="radio"/> 3 passwords remembered <input checked="" type="radio"/> 5 passwords remembered
Password Length:	<input checked="" type="radio"/> 8 characters <input type="radio"/> 10 characters <input type="radio"/> 12 characters
Password Strength:	Accept weak and above
LoginAttempts:	10 attempts
<input type="button" value="Save"/>	

Figure 20: Change Login Policies

2.2. Data Maintenance

The data maintenance part allows the system admin to maintain shared and module specific data.

It is easy to set data with the intuitive and user-friendly interface of SAM. In this section, a list of terminologies and two samples of data setting are given.

2.2.1. Terminology

The table below explains terms used for data maintenance:

TERM	DESCRIPTION
Shared	
Default User Groups	
DUG ID	Auto generated ID number of default user group.

TERM	DESCRIPTION
Default User Group Name	Name supplied in the creation of DUG.
Used in Modules	Codes of available modules including "All".
Departments	
Department	Department of the company
Abbreviation	Department abbreviation, e.g., CS
Name/Description	Department description, e.g., Customer Service
Employee Types	
Employee Type	Employment status
Abbreviation	Abbreviation of employee type, e.g., FT
Name/Description	Description of employee type, e.g., Full Time
Importance	
Importance	Importance of the partner
Abbreviation	Importance abbreviation, e.g., A
Name/Description	Importance description, e.g., High Importance
Offices	
Office	Office of the company
Office Code	Office code, e.g., CHN
Office Name	Name of office, e.g., CHINA - Shanghai
Office Phone 1	Office telephone Number 1
Office Phone 2	Office telephone No. 2
Fax	Facsimile number
Email	Email address, e.g., info@mp3thumb.com.cn
Operating Systems	
Operating System	Operating system of the company
Abbreviation	Abbreviation of operating system, e.g., LIN
Name/Description	Description of operating system, e.g., Linux
Positions	

TERM	DESCRIPTION
Position	Type of job provided by the company
Abbreviation	Position abbreviation, e.g., MGT-001
Name/Description	Position description, e.g., Chairman
Product Lines	
Product Line	The 1 st level of a company's product hierarchy
Abbreviation	Abbreviation of product line, e.g., MP3
Name/Description	Description of product line, e.g., MP3 Player
Salutation	
Salutation	Greeting
Abbreviation	Salutation abbreviation, e.g., MR
Name/Description	Salutation description, e.g., Mr.
Source	
Source	Source where the user gets something
Abbreviation	Source abbreviation, e.g., AD
Name/Description	Source description, e.g., Advertisement - TV
Module Specific	
Frequency (Contact Management)	
Frequency	Frequency of contact
Abbreviation	Frequency abbreviation, e.g., H
Name/Description	Frequency description, e.g., High
Currency (Customer Projects)	
Currency	Currency used for a customer project
Abbreviation	Currency abbreviation, e.g., CNY
Name/Description	Currency description, e.g., Chinese RMB
Size (Customer Projects)	
Size	Size range of a customer project
Abbreviation	Size abbreviation, e.g., S1

TERM	DESCRIPTION
Name/Description	Size description, e.g., Below USD 10K
Units (Customer Projects)	
Unit	Unit of measurement for a customer project
Abbreviation	Unit abbreviation, e.g., Pcs
Name/Description	Unit description, e.g., Pieces
Categories (Forum Module)	
Category	Category of work
Abbreviation	Category abbreviation, e.g., EXE.
Name/Description	Category description, e.g., External – Environment.
Industry Segments (Partner Profile)	
Industry Segment	Industry where the partner belongs
Abbreviation	Abbreviation of industry segment, e.g., CO
Name/Description	Description of industry segment, e.g., Contractors
Partnership Types (Partner Profile)	
Partnership Type	Type of partnership with the partner
Abbreviation	Abbreviation of partnership type, e.g., CM
Name/Description	Description of partnership type, e.g., Contract Manufacturers
Stage (Product Development Tracking)	
Stage	Stage of the project
Abbreviation	Stage abbreviation, e.g., S00
Name/Description	Stage description, e.g., 0. New Product Idea

Table 8: *Fields in Data Maintenance*

2.2.2. Default User Groups (DUG) – Data Maintenance

Companies can create and maintain users groups that are defaulted for all the users in all modules. Navigate to Data Maintenance > Shared > Default User Groups in the tree menu at the left side of the module to view DUG page.

A. Search and Filter DUG

1. Basic Search Mode – enables the user to look for specific DUGs records by supplying the DG ID then clicking on the GO button for specific search or type in certain keywords for quick search then click on the Search button. If the user wants to refresh the page, they can click on the Reset button anytime.

Figure 21: AS Basic Search Mode

2. Advanced Search Mode – provides the user with more choices to select from, ensuring a more precise filter and search. Select through the available fields to filter and get results in the summary page. User may refresh the page by clicking the Reset button to return the default fields.

Figure 22: AS Advanced Search Mode

B. DUG Summary Table

List of previously created DUGs will be displayed in summary table (if there's any).

DUG ID ↕	Default User Group Name	Used in Modules
DG000001	Management	ALL
DG000002	Engineering	BT, PDT, SOP
DG000003	Marketing	ACT, PCT

View 1 - 3 of 3

Figure 23: DUG Summary Table

C. View and Edit DUG Details

1. To view and edit the details, simply click DUG row to open the details preview pane below the summary table. User can edit the details through the below pane.

The screenshot displays the 'View Details' page for a Default User Group (DUG) in the teczo.com system. The interface includes a navigation menu on the left, a search bar at the top, and a table of DUGs. The 'Default User Group Details' section shows the DUG Code 'DG000001' and Name 'Management'. Below this, there are sections for 'General', 'Operations, HR, Finance', and 'Product Development' with various modules selected. A 'Select Users' section on the right shows a tree view of users under 'CHINA - Shanghai' and 'GERMANY - Munich'.

DUG ID	Default User Group Name	Used in Modules
DG000001	Management	ALL
DG000002	Engineering	BT, PDT, SOP
DG000003	Marketing	ACT, PCT

Default User Group Details

DUG Code: DG000001
DUG Name: Management

All Choose

- General**
 - (ACT) Action
 - (ANC) Announcement
 - (CMG) Contact Management
 - (FOR) Forum
- Operations, HR, Finance**
 - (RMA) RMA Handling
 - (TPR) Transaction Processing
- Product Development**
 - (BT) Bug Tracker
 - (CTR) Certification Tracking

Select Users

- CHINA - Shanghai
 - Logistics
 - Meimei Wang
 - Marketing
 - He Zhang
 - Sales
 - Shunde Li
- GERMANY - Munich
 - Logistics
 - Hannah Schmidt
 - Product Marketing
 - Nancy Hobbs
 - Sales

Figure 24: View Details

2. The user can change the DUG Name, select and deselect modules and users.
3. Click Save to keep the changes.

2.2.3. Departments - Data Maintenance

Note: Below steps are to be used in all data management via Data Maintenance.

A. Add a Department

1. Navigate to Data Maintenance > Shared > Departments in the tree menu at the left of the module.
2. The list of previously created departments for the company will be displayed in the initial Department page (if there's any).

Departments		
+ Add new record		Refresh
Abbreviation	Name/Description	
	CS	Customer Service
	EXT	External
	FIN	Finance
	HRA	Human Resources and Admin
	IT	Information Technology
	LAW	Legal
	LOG	Logistics
	MGT	Management
	MKT	Marketing
	PM	Product Marketing
	RND	Research and Development
	SLS	Sales
+ Add new record		Refresh
Page size: 25		Page 1 of 1, items 1 to 12 of 12

Figure 25: *Department List*

3. Click Add new record to enter the add mode.

Departments		
+ Add new record		Refresh
Abbreviation	Name/Description	
Abbreviation:	Name/Description:	
	CS	Customer Service
	EXT	External
	FIN	Finance
	HRA	Human Resources and Admin
	IT	Information Technology
	LAW	Legal
	LOG	Logistics
	MGT	Management
	MKT	Marketing
	PM	Product Marketing
	RND	Research and Development
	SLS	Sales
+ Add new record		Refresh
Page size: 25		Page 1 of 1, items 1 to 12 of 12

Figure 26: *Add Department*

4. Enter a abbreviation and description for the new department.
5. Click the Check icon to save the department, else click the Cross icon.

B. Edit a Department

1. Repeat Step 1) and Step 2) as described in adding a department.
2. Click the Pen icon at the left side of each category in the list to enter the edit mode.































Departments		
 Add new record	 Refresh	
Abbreviation	Name/Description	
 CS	Customer Service 	
Abbreviation: <input type="text" value="CS"/>	Name/Description: <input type="text" value="Customer Service"/>	
	 	
 EXT	External 	
 FIN	Finance 	
 HRA	Human Resources and Admin 	
 IT	Information Technology 	
 LAW	Legal 	
 LOG	Logistics 	
 MGT	Management 	
 MKT	Marketing 	
 PM	Product Marketing 	
 RND	Research and Development 	
 SLS	Sales 	
 Add new record	 Refresh	
Page size: <input type="text" value="25"/>		Page 1 of 1, items 1 to 12 of 12

Figure 27: Edit Department

3. Click the Check icon to save the changes, else click the Cross icon.

C. Delete a Department

1. Repeat Step 1) and Step 2) as described in adding a department.
2. Click the Trash Bin icon and confirm the deleting operation as prompted. *Note: Department can't be deleted if the data is being used in any modules.*

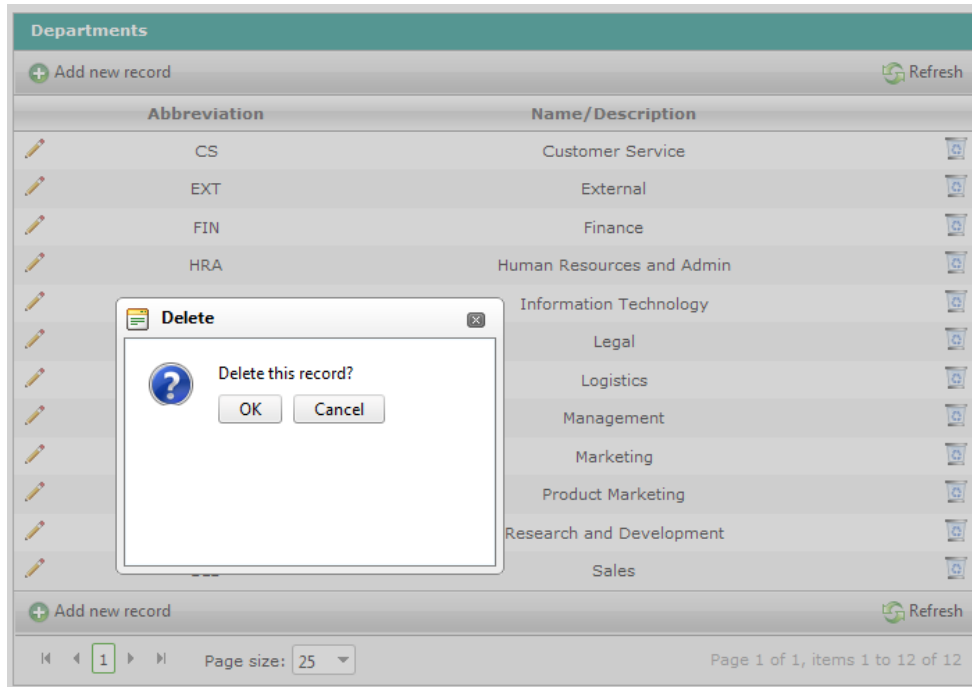


Figure 28: *Delete Department*

D. Refresh the Category List

1. Repeat Step 1) and Step 2) as described in adding a department.
2. Click Refresh.

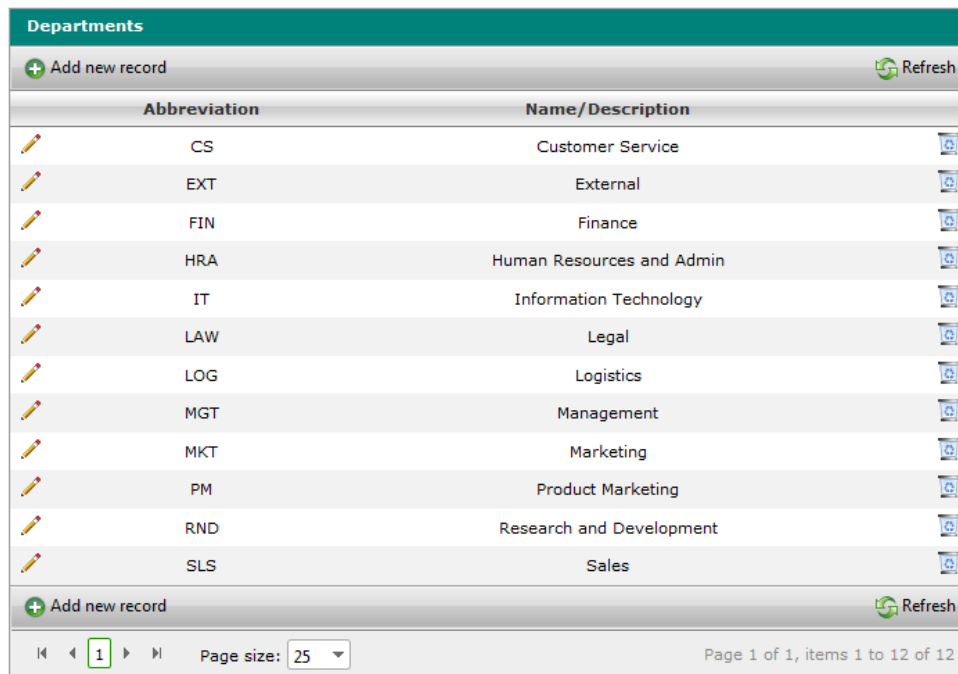


Figure 29: *Refresh Category List*

2.2.4. Approval Settings - Data Maintenance

Companies can create and maintain list of approvers for the modules such Product Change Tracking and RMA. List of approvers will be available for the users upon creating items that are related to the specific products. Navigate to Data Maintenance > Modules > Product Change Tracking / RMA Handling > Approval Setting in the tree menu at the left side of the module to view Approval Setting page.

A. Search and Filter AS

1. Basic Search Mode – enables the user to look for specific AS records by supplying the AS ID then clicking on the GO button for specific search or type in certain keywords for quick search then click on the Search button. If the user wants to refresh the page, they can click on the Reset button anytime.



Figure 30: AS Basic Search Mode

2. Advanced Search Mode – provides the user with more choices to select from, ensuring a more precise filter and search. Select through the available fields to filter and get results in the summary page. User may refresh the page by clicking the Reset button to return the default fields.



Figure 31: AS Advanced Search Mode

B. AS Summary Table

The list of product lines defined in the shared data maintenance is automatically added with corresponding ID.

All (10) Action				
	ID	Product Line	Allow Change	Approvers
<input type="checkbox"/>	AS000001	MP3 Player	Y	Joseph Johnson
<input type="checkbox"/>	AS000002	Thumb Drive	N	David Jones

Page size: 50 Page 1 of 1, items 1 to 2 of 2

Figure 32: AS Summary Table

D. View, Assign or Edit AS Details

1. To view, assign or edit the details, simply click AS row to open the details preview pane below the summary table. User can edit the details through the below pane.
2. The user can change select the name of the approver for the selected product line and the level of the approver.
3. User can check the box in the Allow Change to allow changes of the approvers from Approved to Rejected or vise versa.
4. To apply the setting to ongoing approval process of items in the modules check the box.
5. Click Save to keep the changes and Reset to return the previously set approvers.

ID	Product Line	Allow Change	Approvers
AS000001	MP3 Player	Y	Joseph Johnson
AS000002	Thumb Drive	N	David Jones

Approver	Order	Allow Change
<Select>	<Select>	<input type="checkbox"/>
<Select>	<Select>	<input type="checkbox"/>
<Select>	<Select>	<input type="checkbox"/>
<Select>	<Select>	<input type="checkbox"/>
<Select>	<Select>	<input type="checkbox"/>

Apply this setting to ongoing approval process

Save Reset

Figure 33: *View Details*