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Yooz Rising: Basic Admin Functions

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Objective and training plan

- Objective of the training
  - Provide knowledge enabling administrators on the new experience Yooz Rising.

- Training plan
  - How to connect ?
  - Guided tour and Yooz Support throughout your experience!
  - Create your user accesses
  - Manage user roles (guidelines, customization, creation)
  - View the capabilities of a role
  - Edit a complete invoice
  - Generate an export of an invoice
  - Manage the user notifications and reminders
  - Manage the duplicates and dispute
  - Editing a complete document

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How to connect?

Login to Yooz Rising

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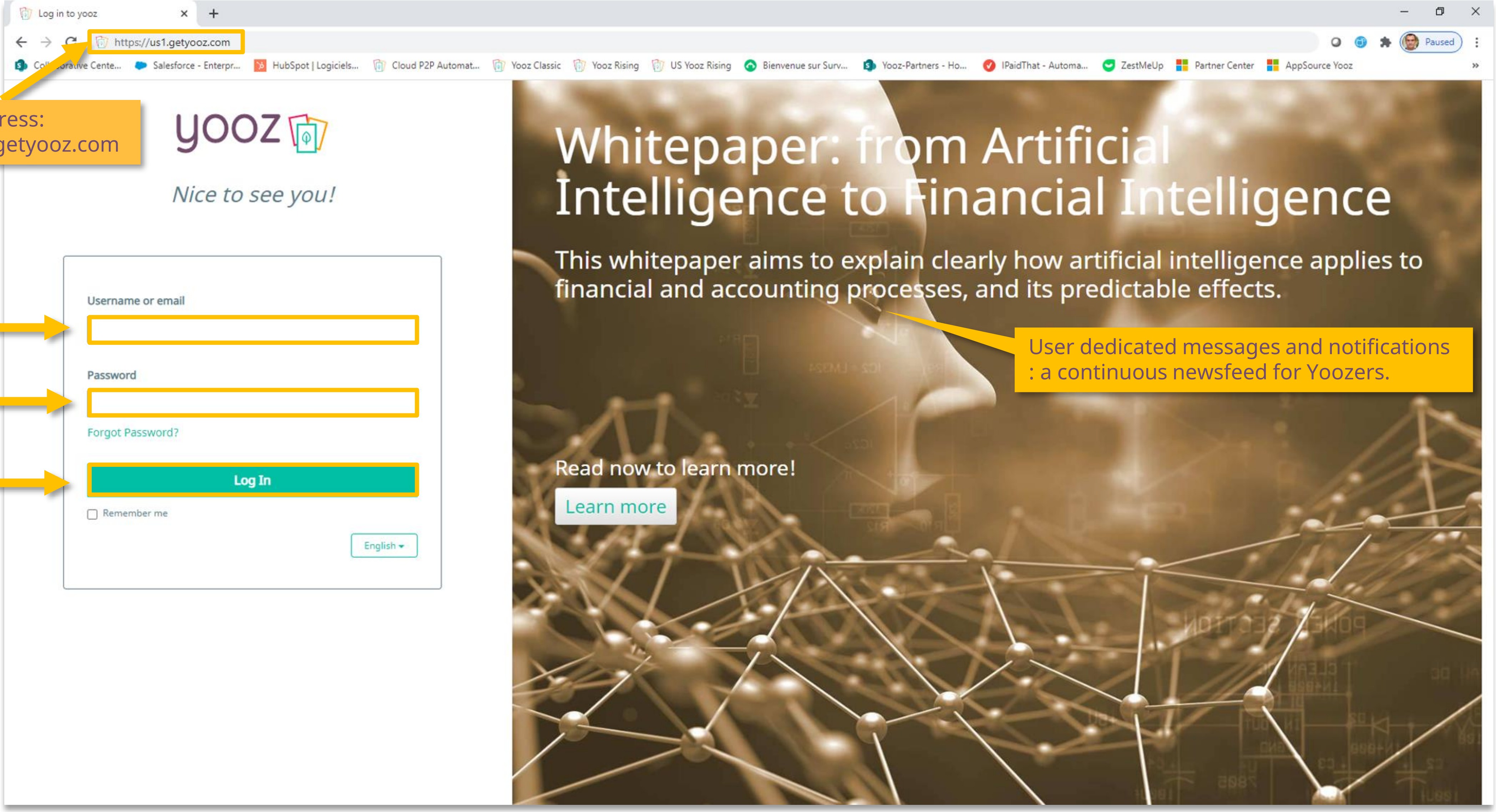
A single address:
https://us1.getyooz.com



1

2

3

User dedicated messages and notifications : a continuous newsfeed for Yoozers.

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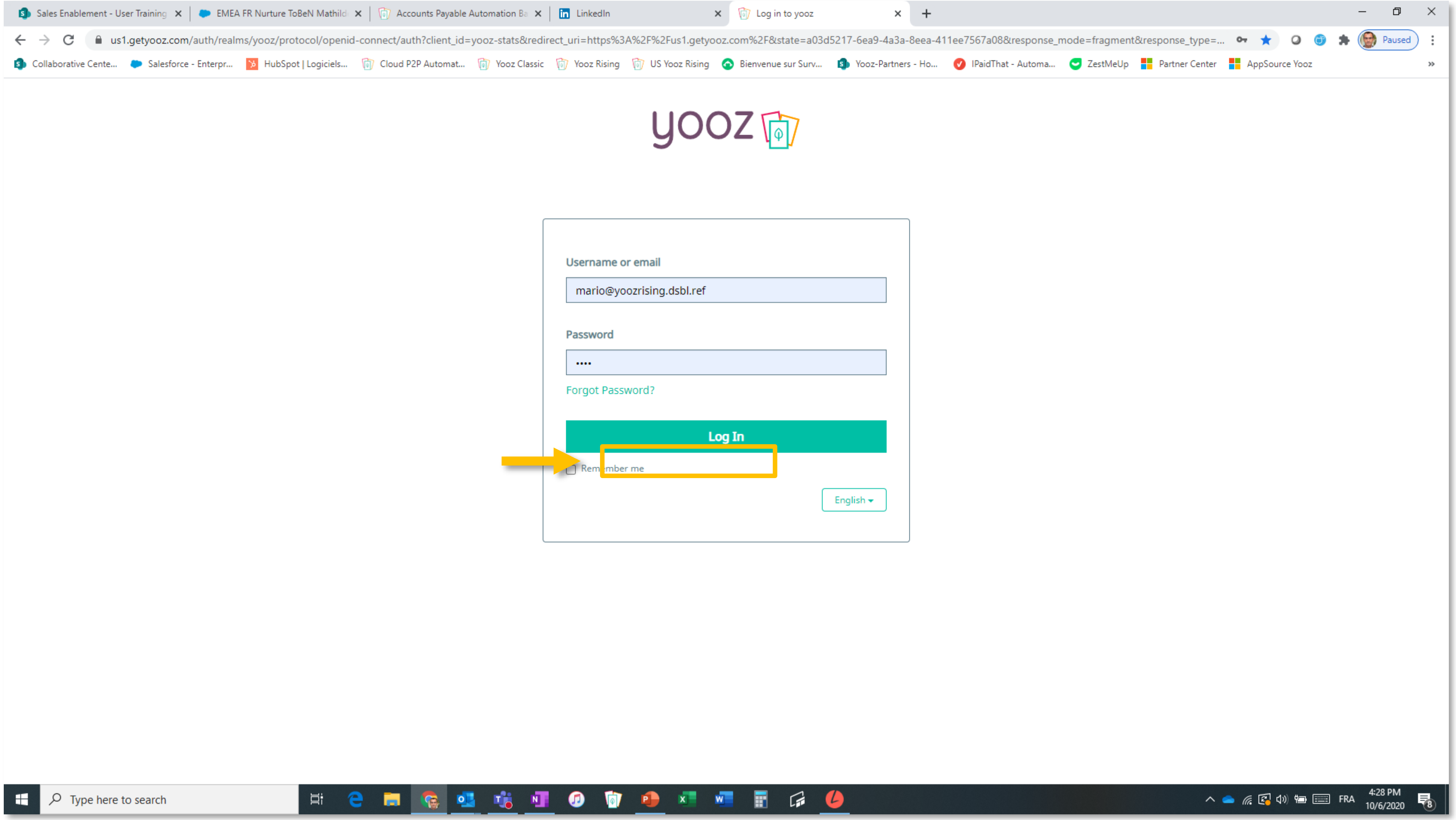
Reset password



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Your credentials

Welcome to Yooz application !

notification@getyooz.com via sendgrid.net
À moi

A Yooz account has been created with your email address. If this was you, click the link below to verify your email address and create your password

Follow this link

This link will expire within 720 minutes.

If you didn't create this account, just ignore this message.

Perform the following action(s): **Update Password**

» Click here to proceed

English

You need to change your password.

New Password

Confirm password

Submit

English

Your account has been updated.

« Back to Application

English

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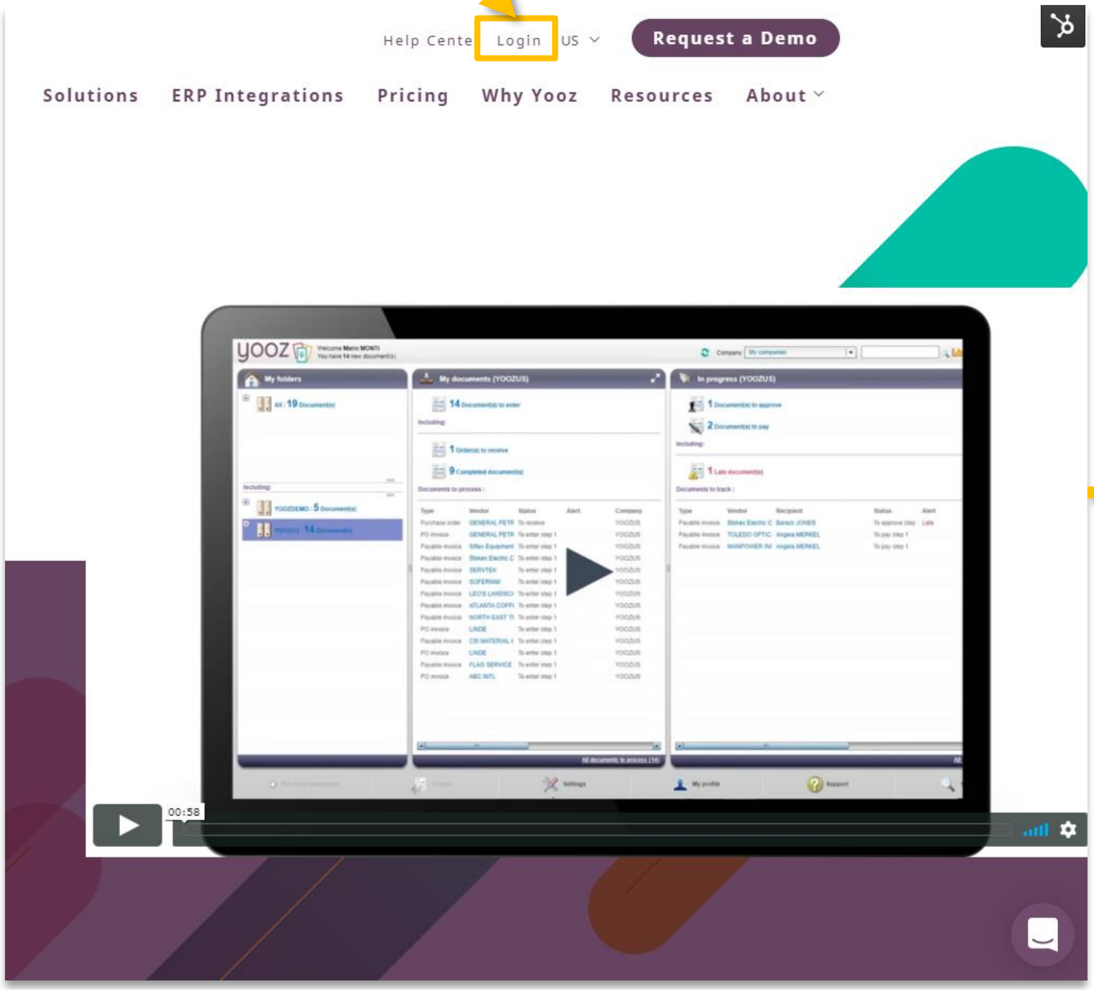
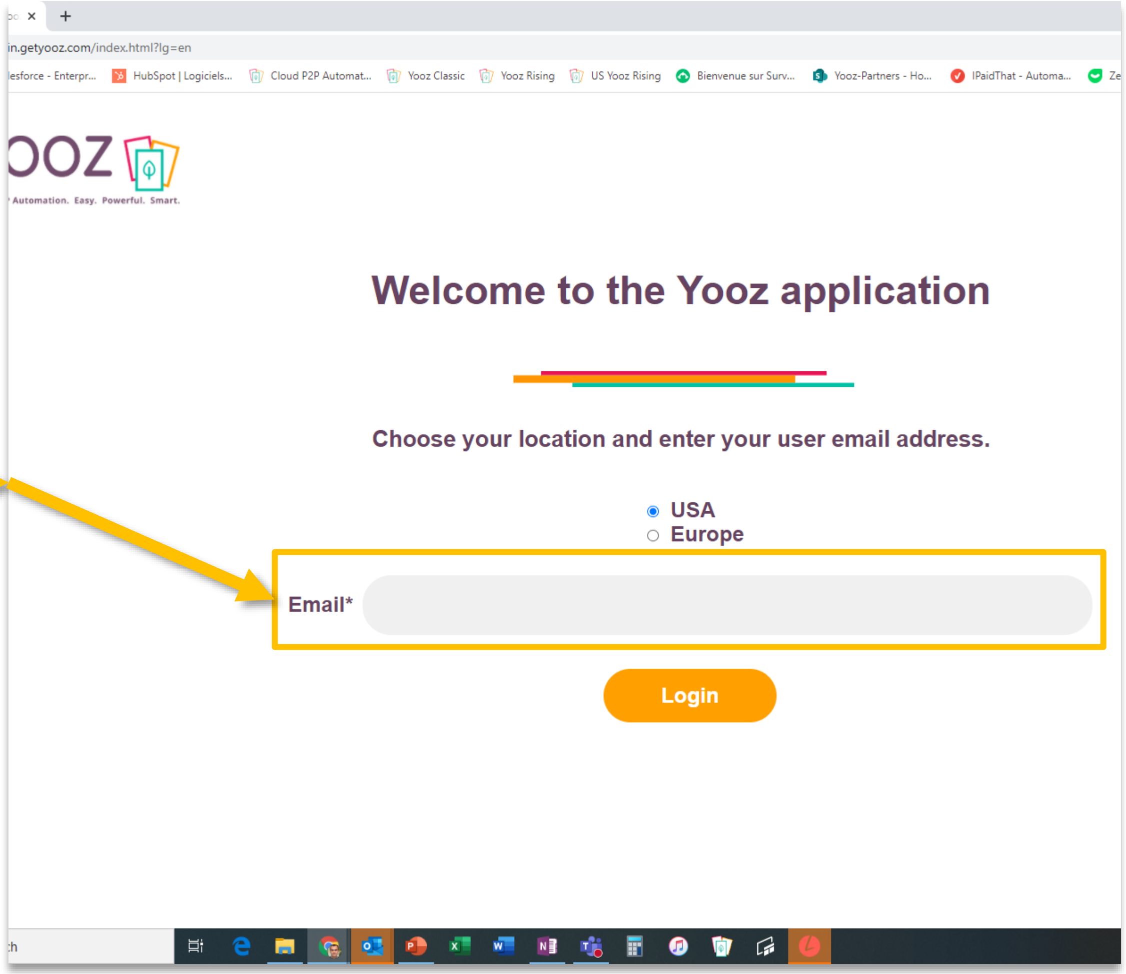
Or login on our web site





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Access

- With an administrator role or at least a permission giving access to set-up features, you will be able to access to the administration settings from the home page, at the top right of the screen.

- Main roles allowing access to the settings : Administrator or Extended Accountant
  - Note : The number of submenus of the settings screen depends on your role and your permissions. For example, an admin will see everything but an accountant will only have access to the functional settings.

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Create user access

Creation of user access

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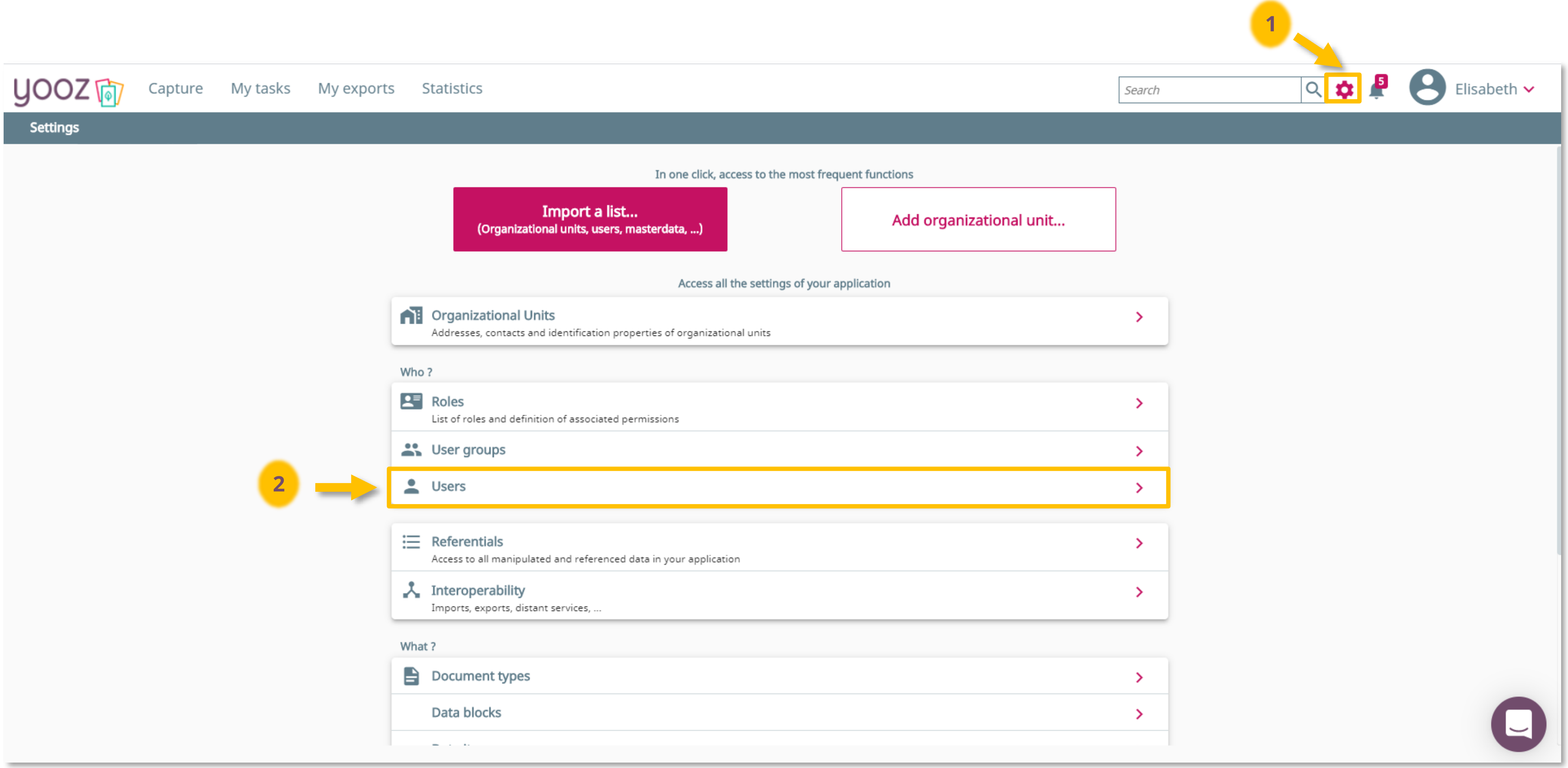

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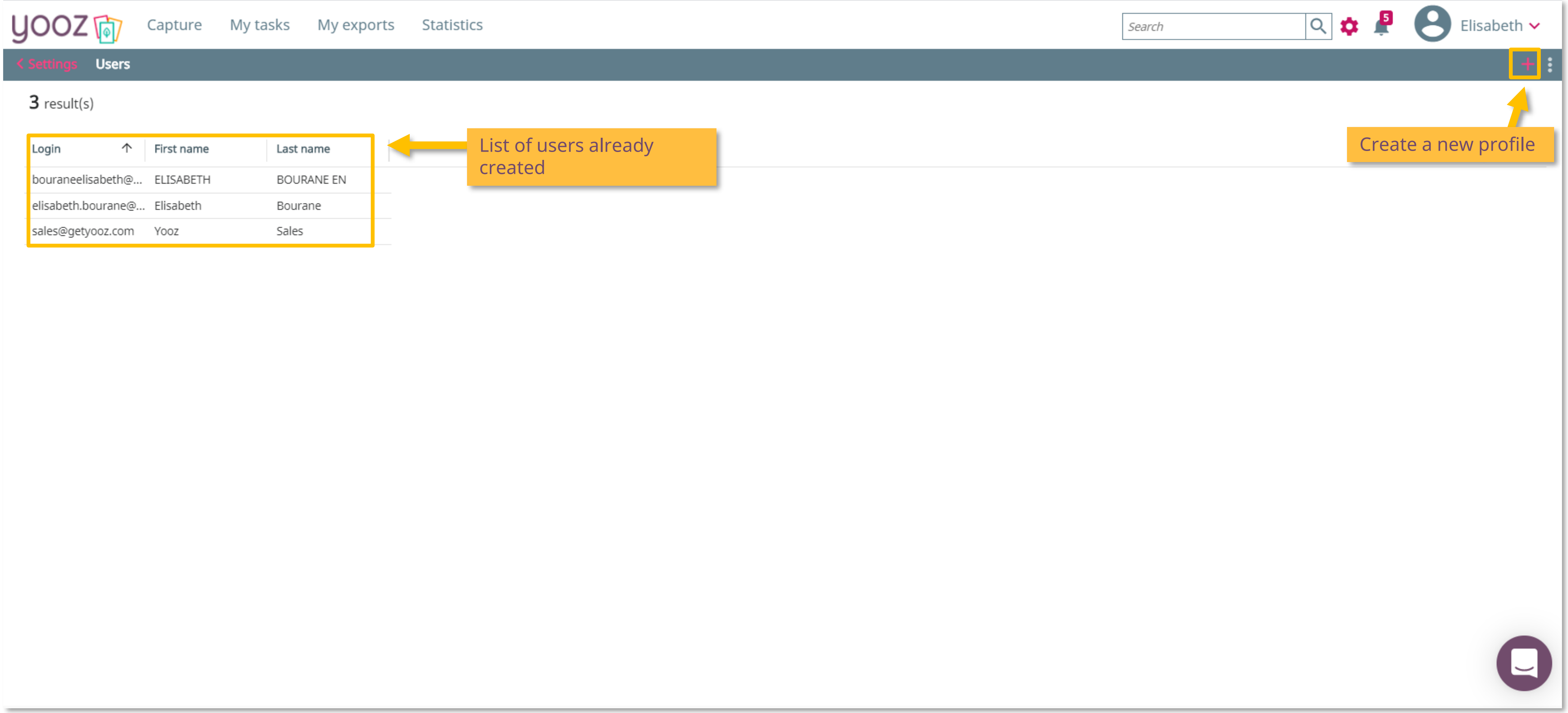
Creation of user access



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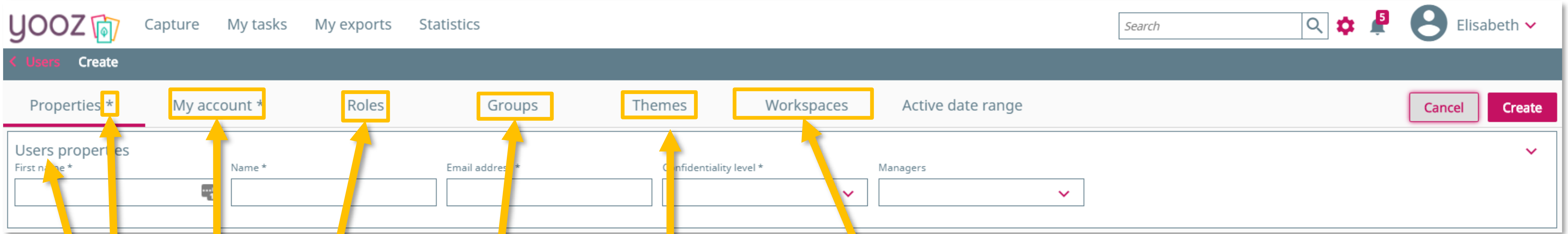
Creation of user access



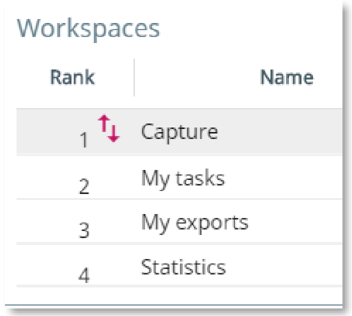
Mandatory data has an asterisk *

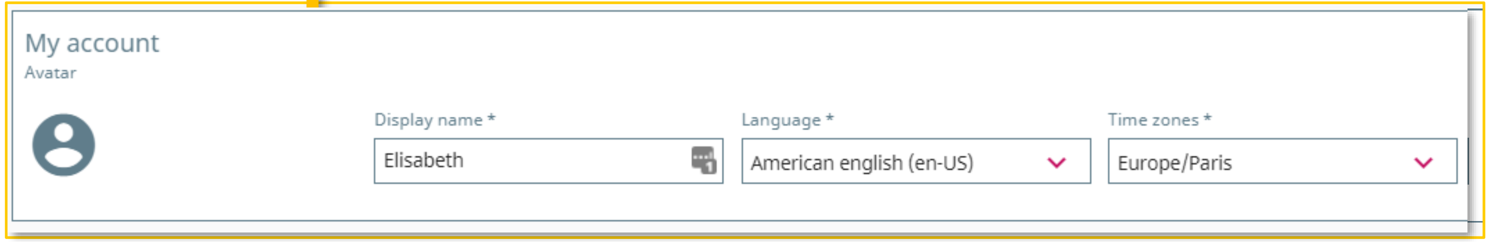
You can add or limit roles by the tab « Roles »

You can use the tab « Groups » to add the user to an existing group

The tab « Themes » enable the customization of the user workspace

In the tab « Workspaces » you can see the workspaces available for the user depending on the chosen roles and organize them with the double arrow





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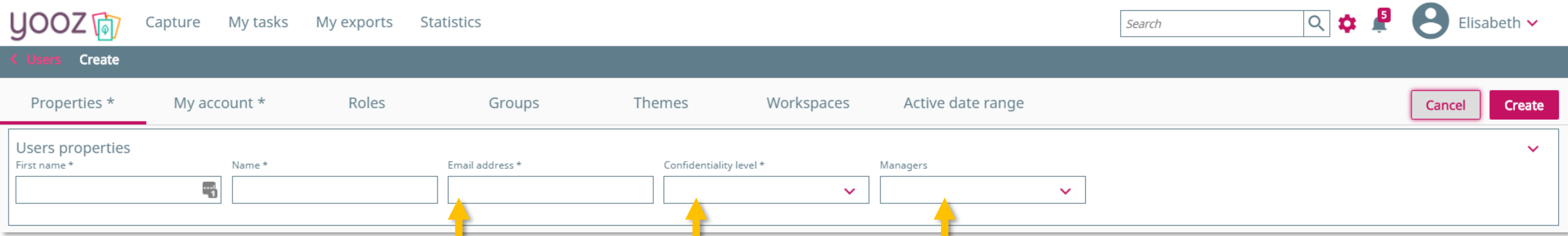
Properties



The credentials will be sent to the **e-mail address** of the user.

The **confidentiality level** is graduated from 0 to 5. If a document is imported with level 4 and the user has level 3, he will not be able to get access to it.
A user with level 5 has access to all the confidentiality levels.

You can fill the **manager** who will receive reminders.

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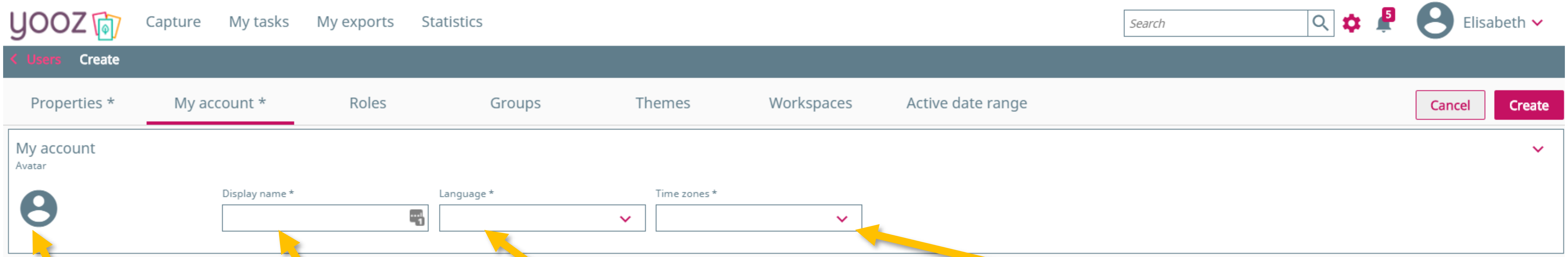
My account



By clicking on this icon, you can upload the **picture** of the created user. It should be a square, max 19 Mo.

The **displayed name** could differ from the first name and the last name in the tab Properties.

You can select the **language** of your user and modify it.

Set the **time zone** on your user profile allows to have the user's local time on the history for each actions performed on his documents.

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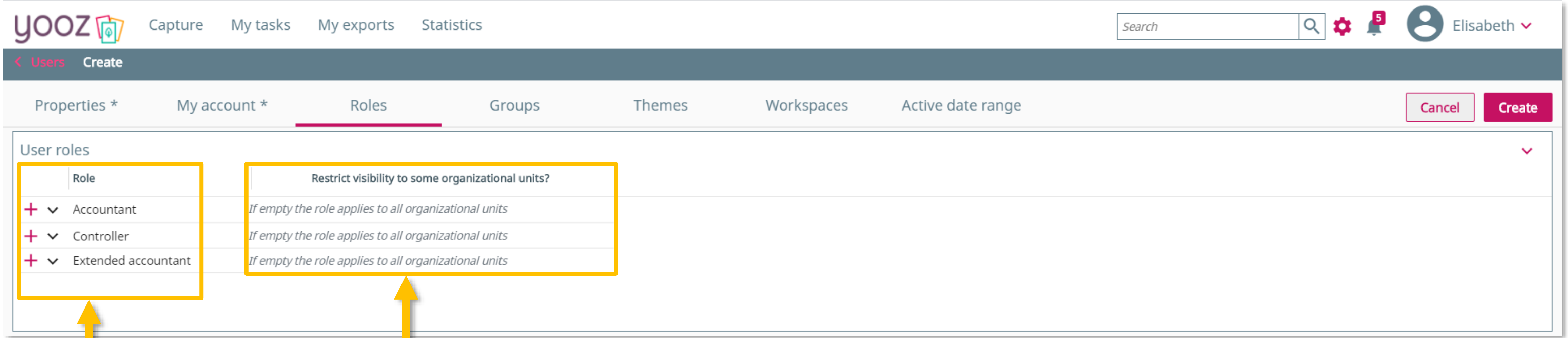
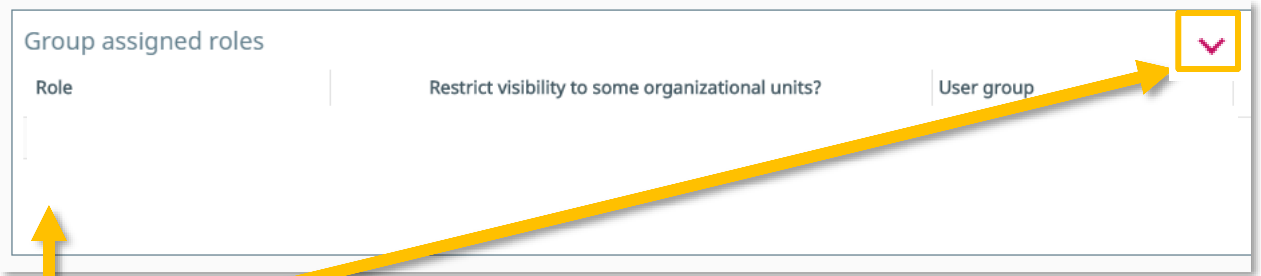
Roles





I select the roles of my user.
Note : you can combine roles.

You can customize roles by organization. For example, the user will be able to enter documents only for 3 organizations. On the 2 others, he will only have the controller role.

You can add the user to one or many groups.
Here, you can see the role depending the group, because the group can provide roles to the users (next screen).

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Summary of standard roles

Role	Assignee of tasks	Permissions allowed	Workspaces accessible
Capture agent	Split (if initiated by him)	Import, configure a YooxBox	Capture
Clerk	Entry documents	Editing informations of the documents existing in the tasks	My tasks Search
Accountant	Entry invoices and assets Split (if initiated by him)	Import, delete, export, link Editing informations of the documents existing in the tasks	Capture My tasks My exports Search
Extended accountant	No	Same as the accountant Access to the functional settings (referential databases, exports…)	Capture My tasks My exports Search Settings
Purchasing Clerk	Entry Purchase Requests		
Approver	Approve documents	View, approve documents, edit GL accounts and dimensions	My tasks Search
Controller	No	View and download documents	Search
Administrator	No	All the settings	Search Settings

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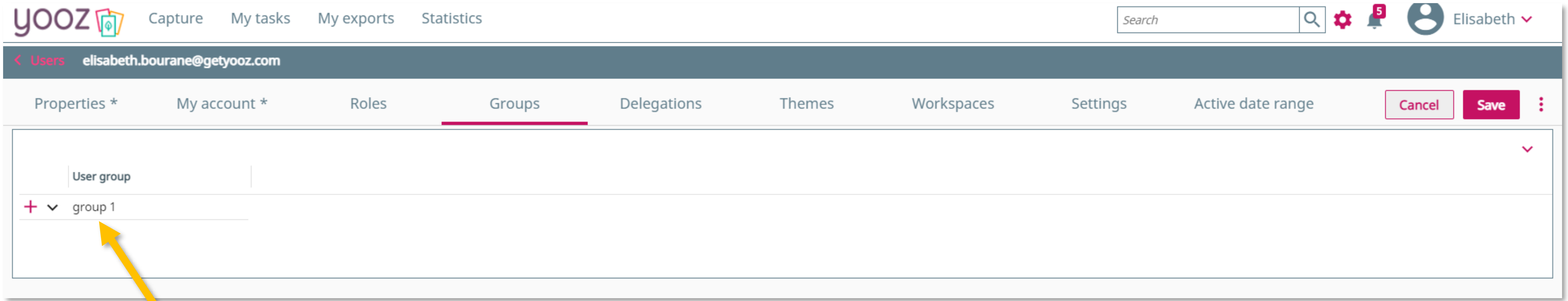
Groups



If a user group has been created, you can associate if you want, the new user to one or many groups.

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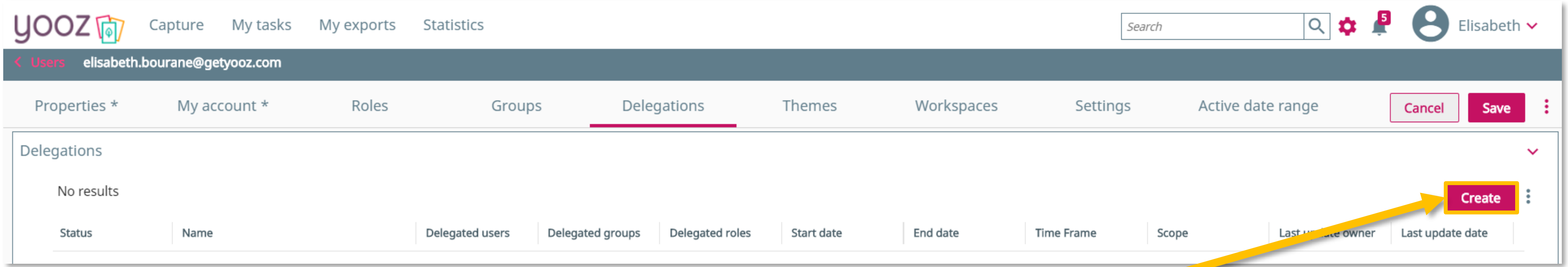
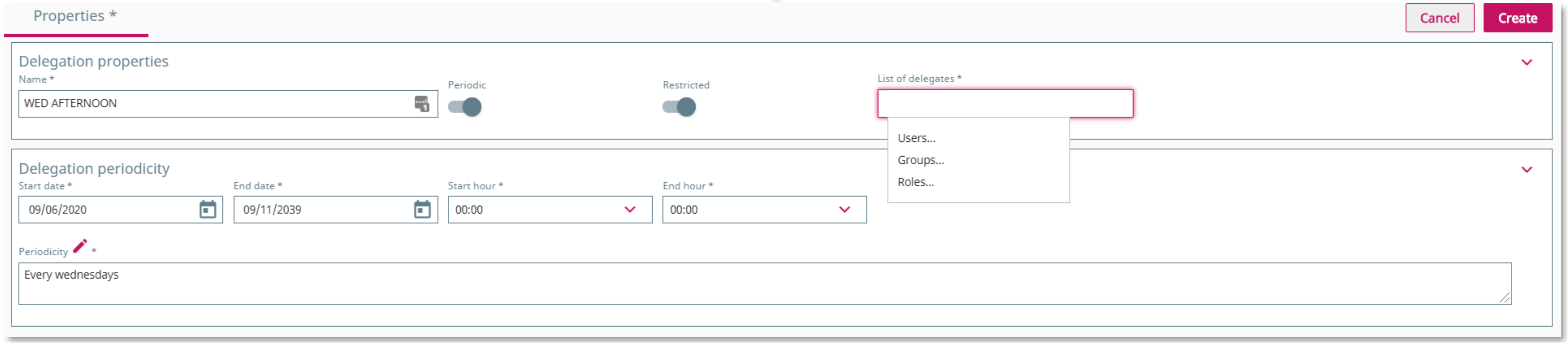
Delegations



With the Delegations tab, you can create a delegation for this user. For example, you already know that the user will be out of office every Wednesday afternoon, you can set up his delegation here.



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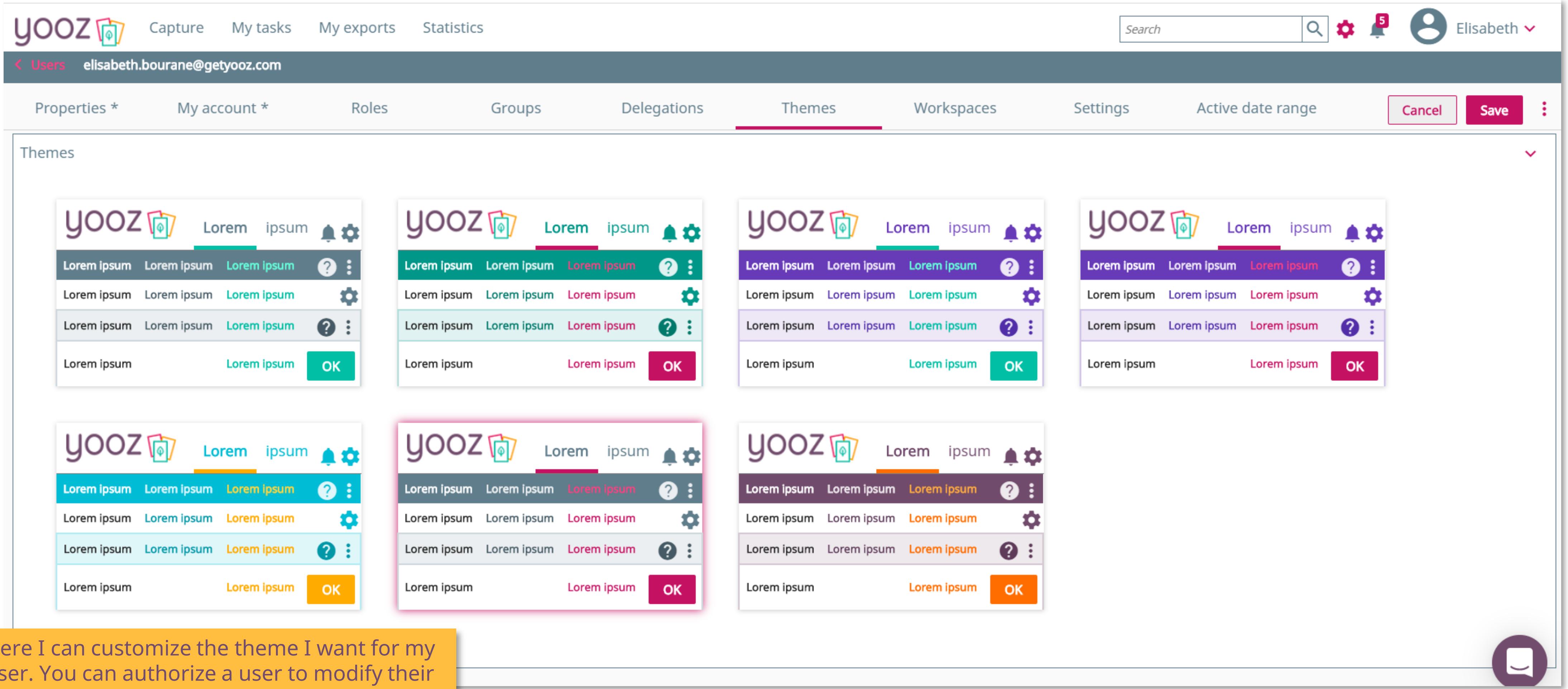
Themes



Here I can customize the theme I want for my user. You can authorize a user to modify their profile or not.

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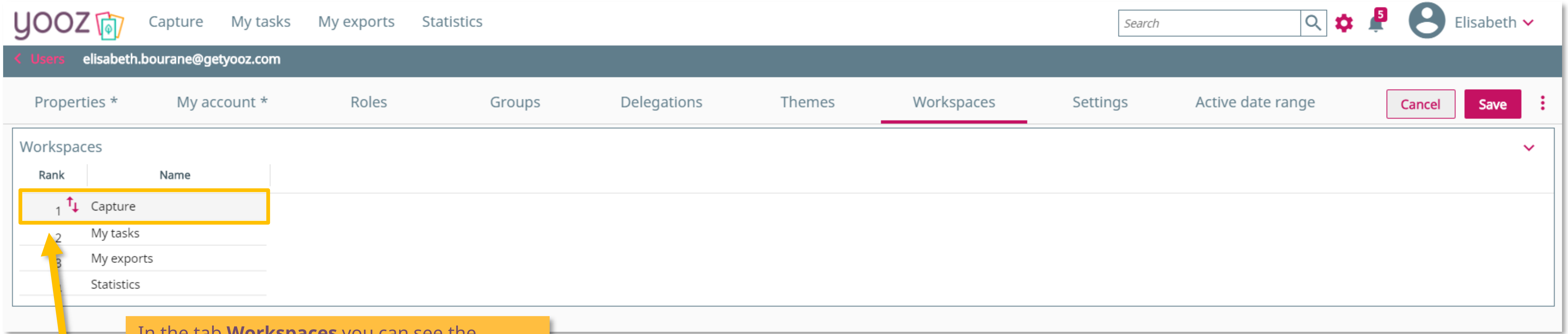
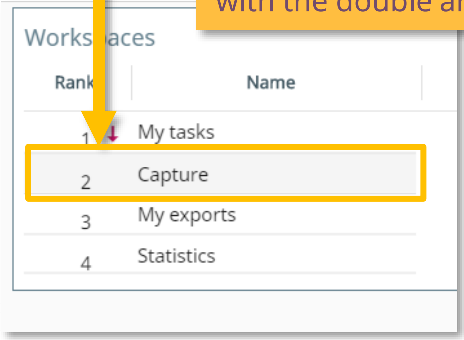
Workspaces



In the tab **Workspaces** you can see the workspaces available depending on the roles of the selected user. You can also **rank** them with the double arrow.



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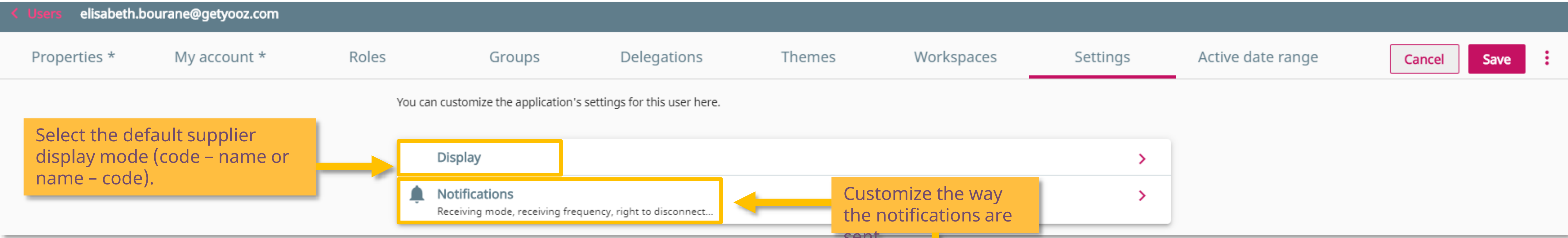
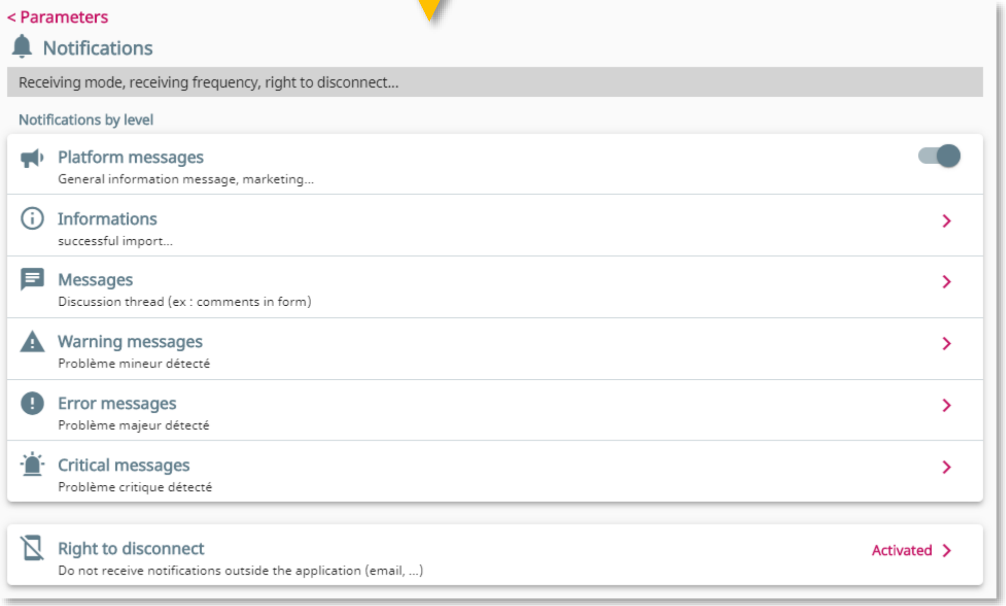
Settings



Select the default supplier display mode (code – name or name – code).

Customize the way the notifications are sent.



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Manage the user notifications and reminders

Managing notifications

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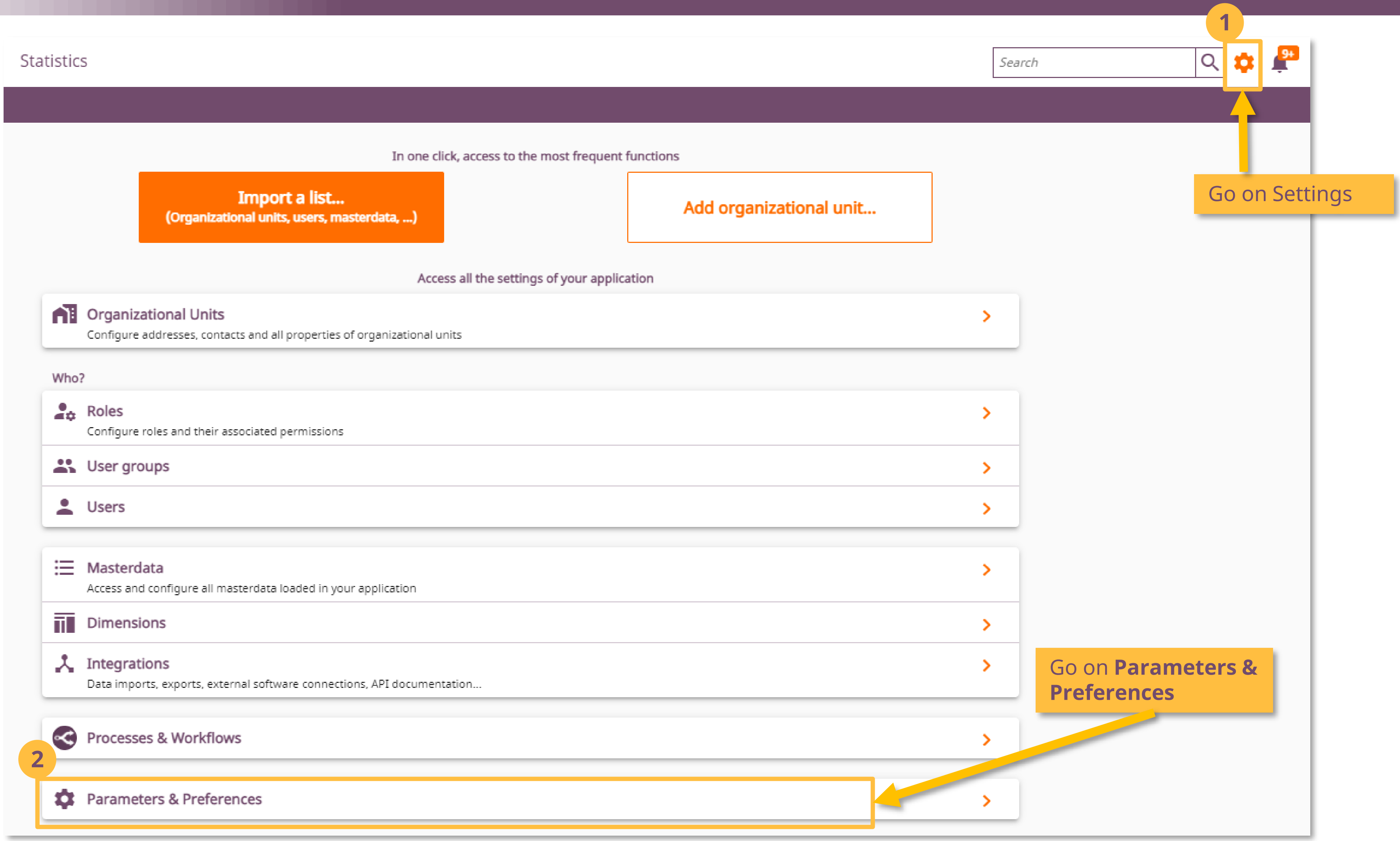

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Managing notifications

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- Go to **Notifications**

Parameters & Preferences

- Application
- Display
- Documents processing preferences
- Notifications
  Configure notification methods, frequencies, do not disturb hours, etc. Notification levels are defi

< Parameters & Preferences

Notifications

Configure notification methods, frequencies, do not disturb hours, etc. Notification levels are defined for each notification in the masterdata.

Notifications by level

- Platform messages
  General information messages, Yooz updates ...
- Informations
  Information notification level (ex: successful masterdata import...)
- Messages
  Message notification level typically for discussion thread (ex: comments in document)
- Warning messages
  Warning notification level typically for important information or minor errors
- Error messages
  Error notification level typically for major errors
- Critical messages
  Critical notification level typically for critical issue
- "Do not disturb" hours
  Do not receive notifications outside of the application (ex: via email, ...)

Customize how you want to notify the user by notification type.

Activate " Do not disturb " hours if needed.

< Parameters & Preferences < Notifications

Informations

Information notification level (ex: successful masterdata import...)

- Receive in the notification center
- Receive by email — Deactivated

Choose how users are notified: by email or in their notification center.

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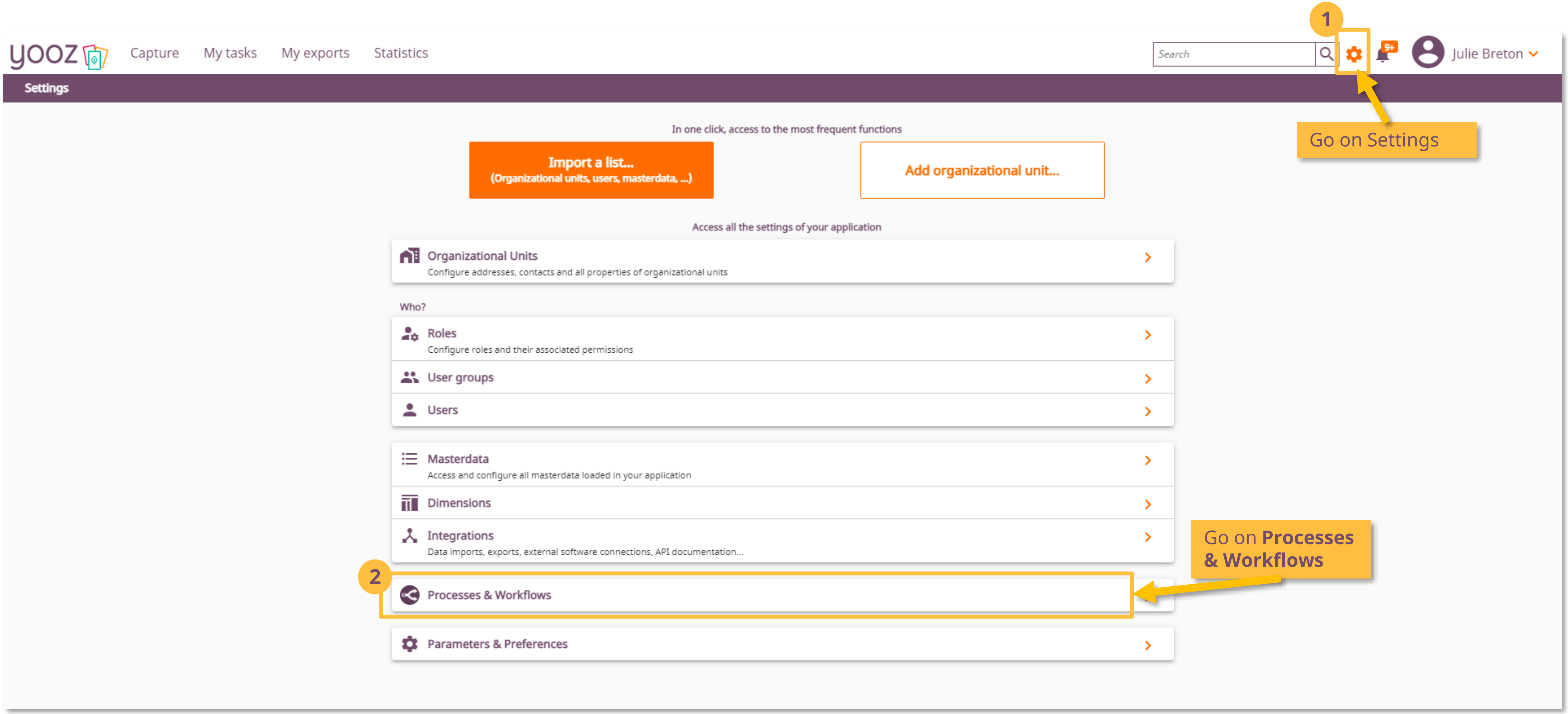
Managing reminders (1/3)



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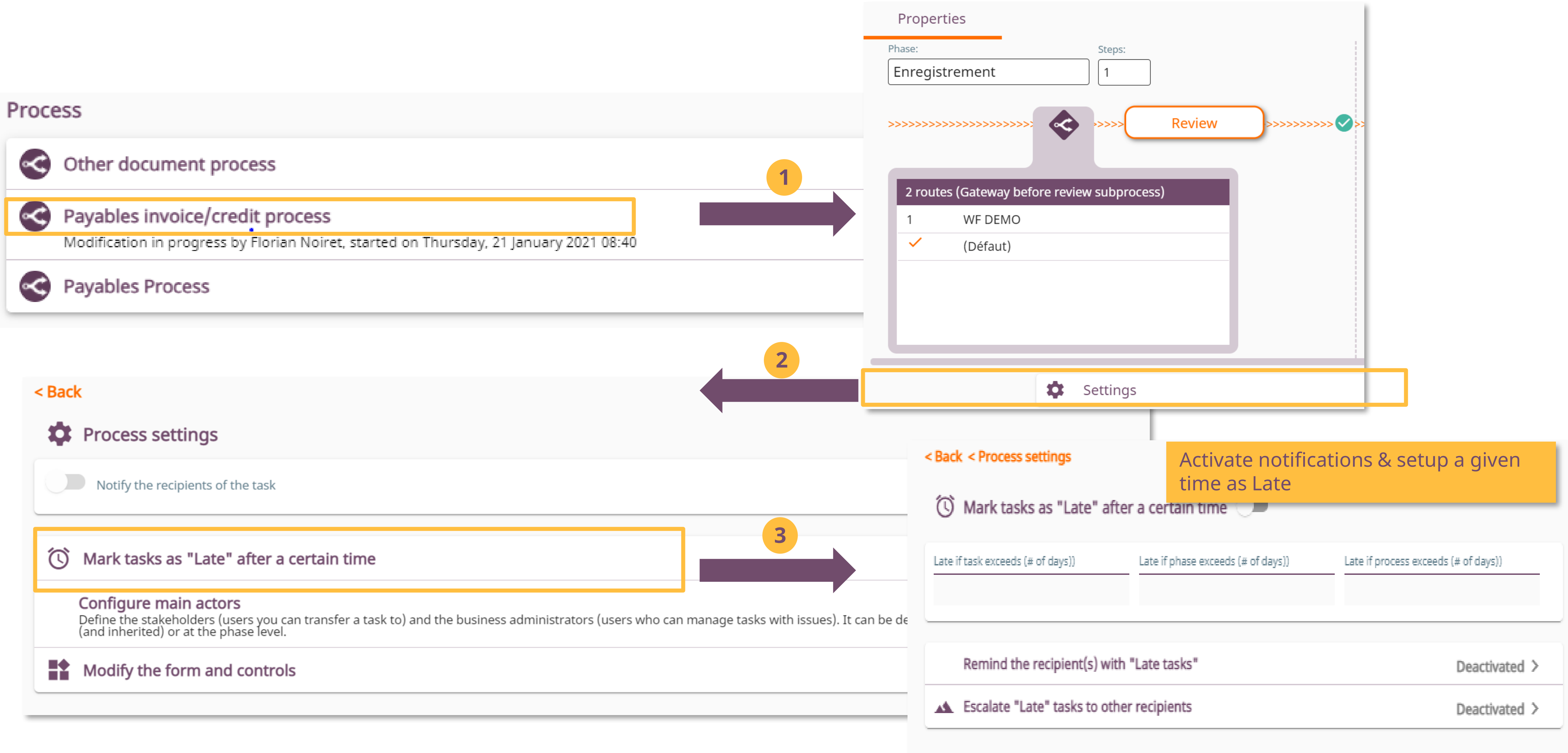
Managing reminders (2/3)

- For these settings, go to « Payables invoice/credit process» then « Settings »



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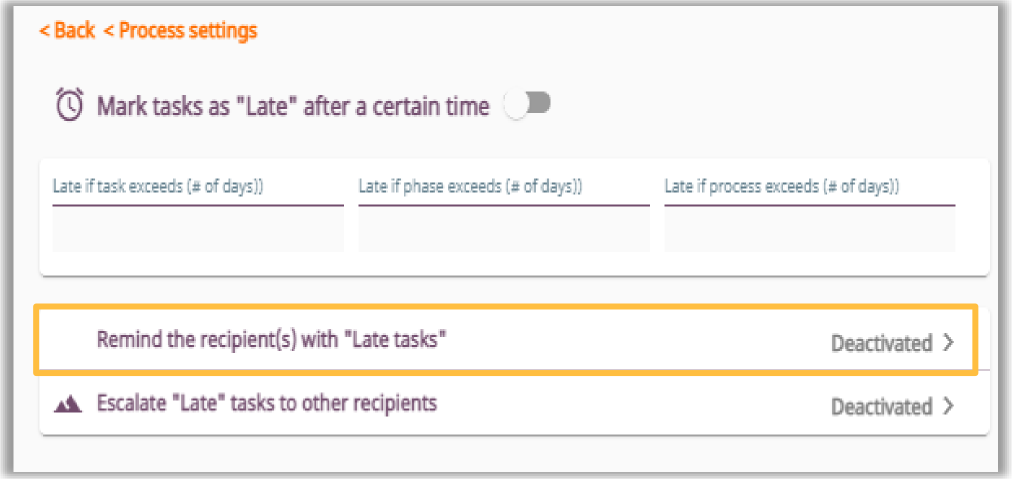
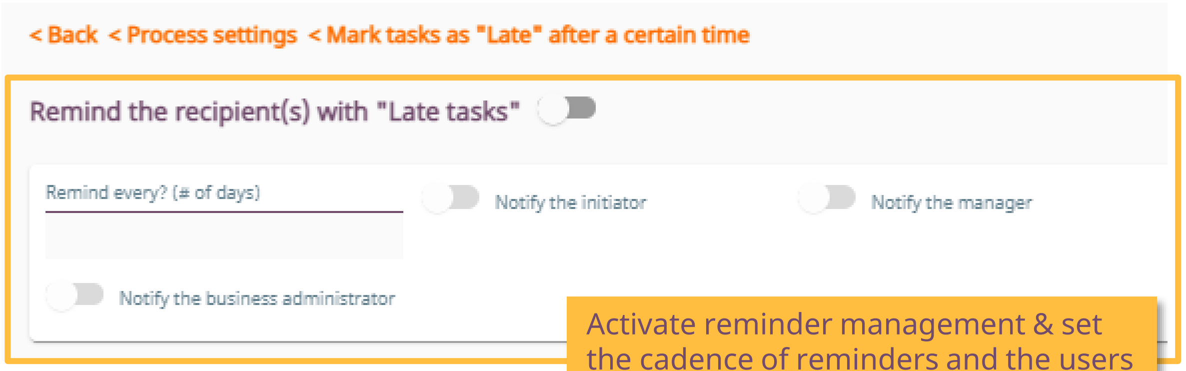
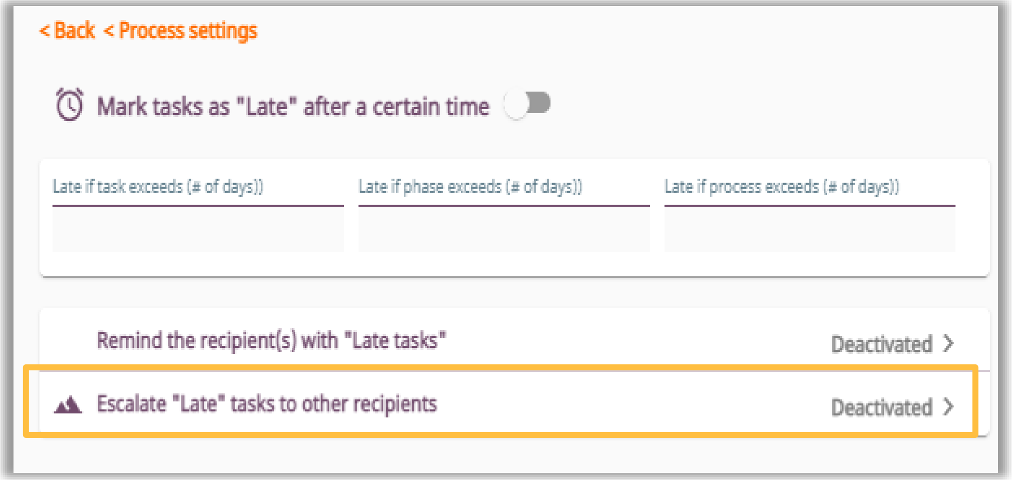
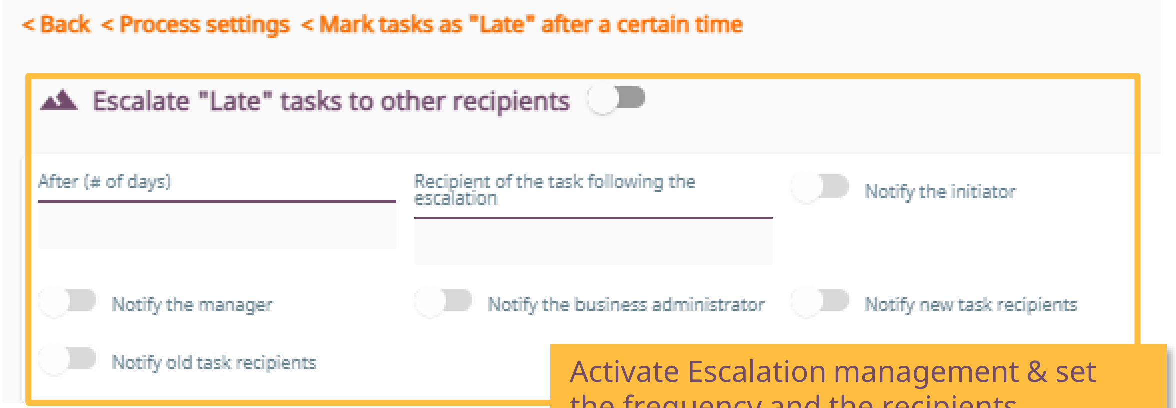
Managing reminders (3/3)





Activate reminder management & set the cadence of reminders and the users to be notified.





Activate Escalation management & set the frequency and the recipients

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Manage the duplicates and dispute

yooz
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Managing duplicates

- For these settings, go to « **Settings** »

Benoit-Olivier

< Parameters & Preferences

Documents processing preferences

Document deletion

Payment configuration — Activated

Invoices and credits
Configure the behavior of the application for invoices and credits

Duplicate detection

Go to **Parameters & Preferences →** **Documents processing preferences** then **Duplicate detection.**

< Parameters & Preferences < Documents processing preferences

Duplicate detection

Information level

Warning level

Error level

Each validation level can be configured independently:
- Information: non-blocking
- Warning: blocking but forced (suspicion)
- Error: blocking

< Parameters & Preferences < Documents processing preferences < Duplicate detection

Error level

Duplicate detection scope	Third party (vendor, cu...	Document number	Document date	Document total am
Application	✓	✓	✓	✕

Each control can be applied to:
- The current organizational unit only
- The current organizational unit and its parents (and its hierarchy)
- The entire application (all organizational units)

The checked box means "use this date as a duplicate verification key".

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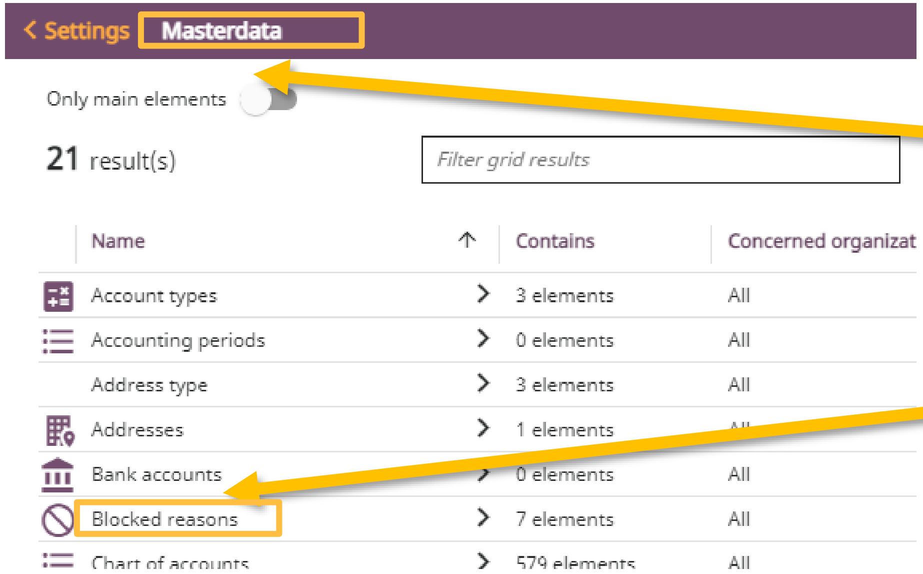
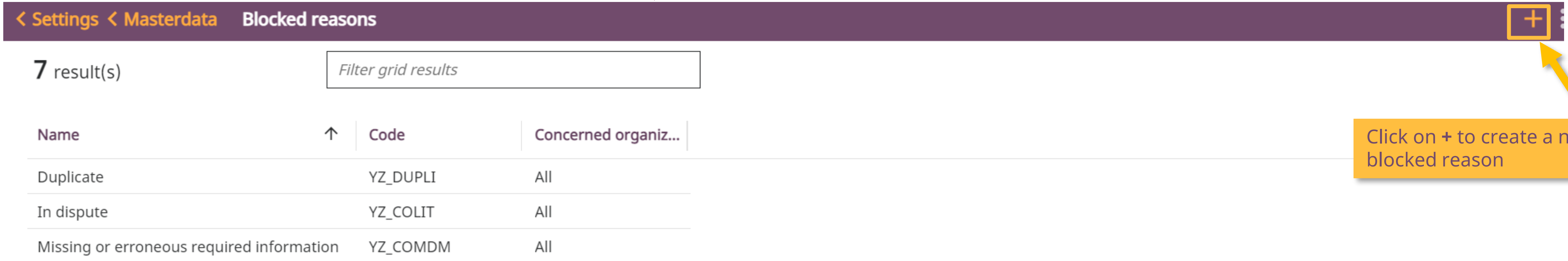
Managing Dispute (1/2)

- For these settings, go to « **Settings** »



Go to **Masterdata** then select **Blocked reasons**



Click on **+** to create a new blocked reason

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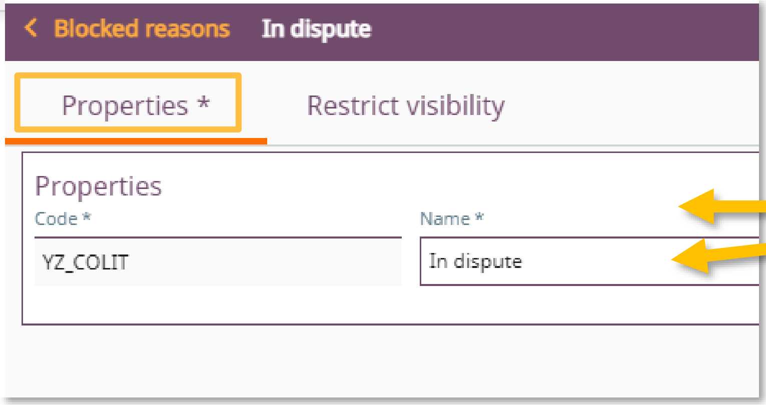
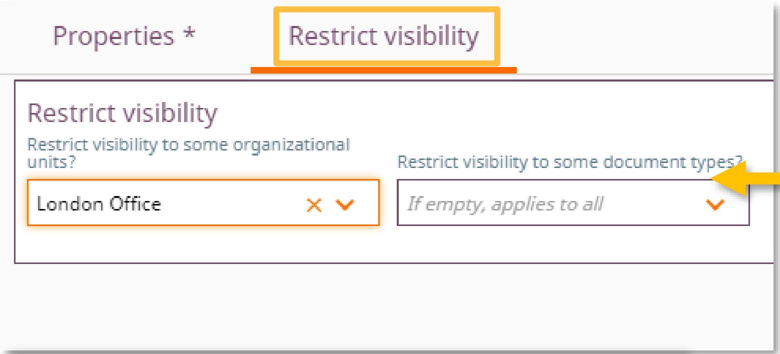
Screenshot

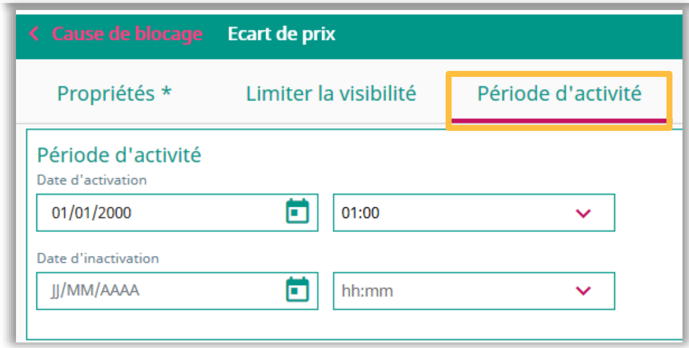
Managing dispute (2/2)



Properties :
- Assign a code to the blocking reason
- Name the blocking reason



Restrict visibility:
- to one or more organizational unit(s)
- to one or more types of documents



Period of activity:
Define the period of activation of the blocking reason

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Editing a complete document

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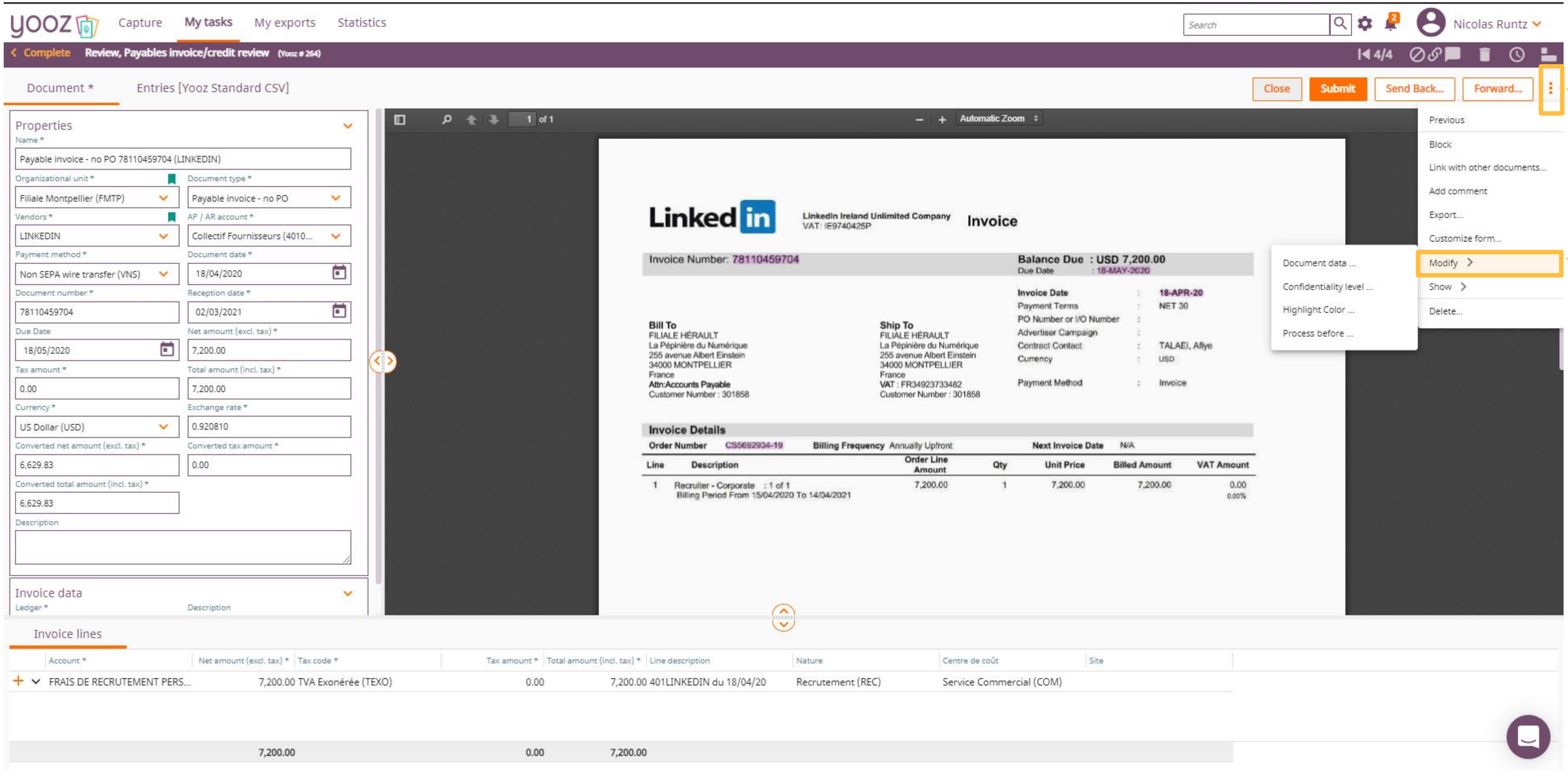
Modify options

- To modify a complete document, go to the Workspace My Tasks and open the Invoice.



Click on the 3 dots.

Click on Modify.

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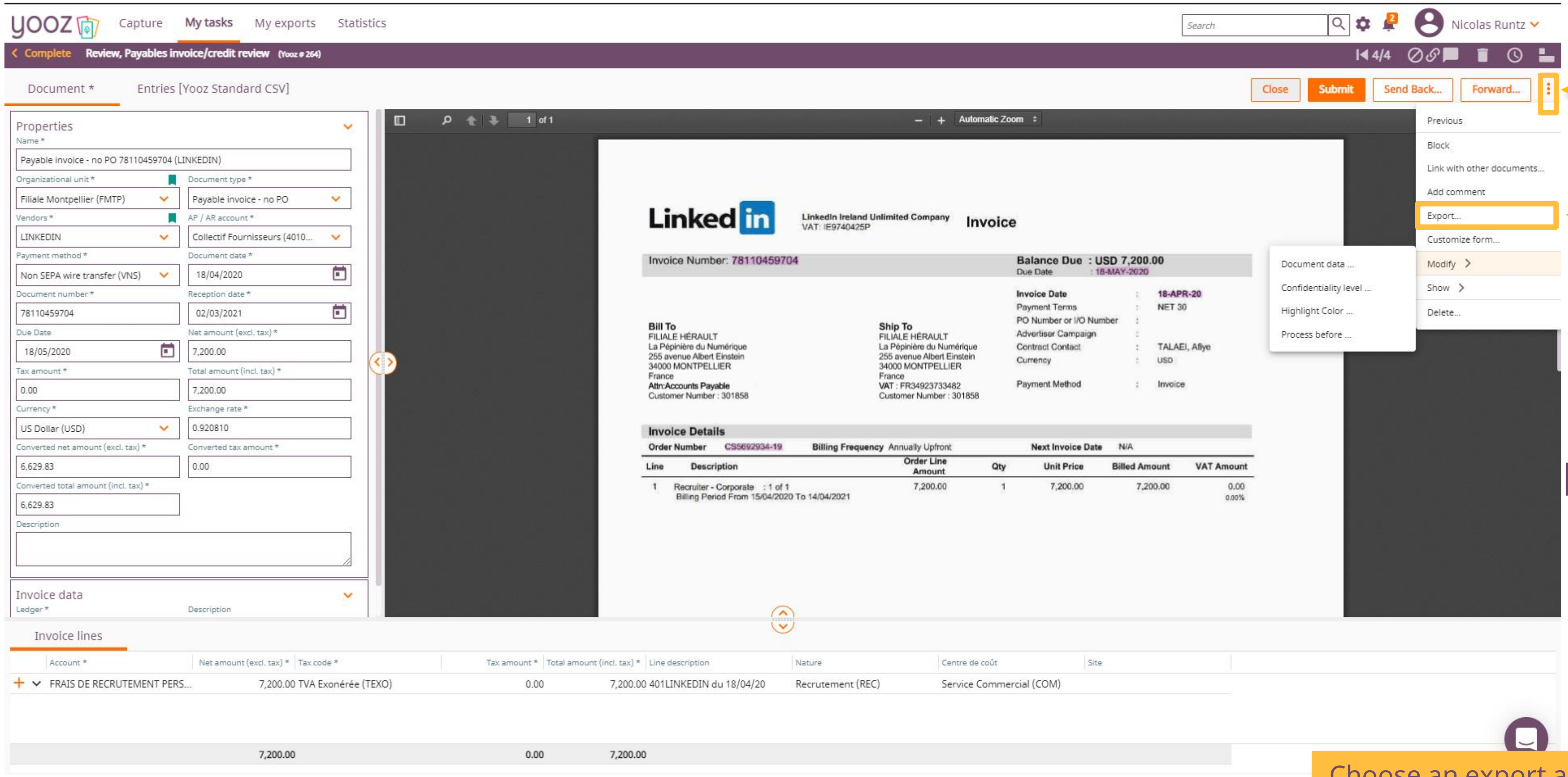
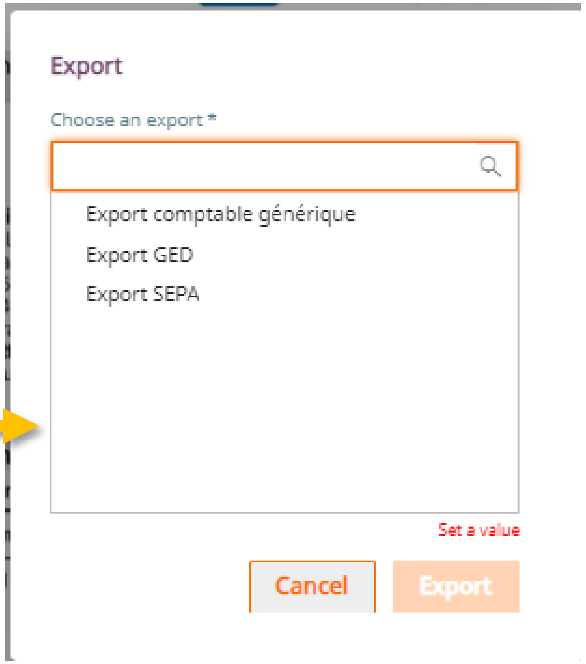
Export options



Click on the 3 dots.

Click on Export

Choose an export and click on Export



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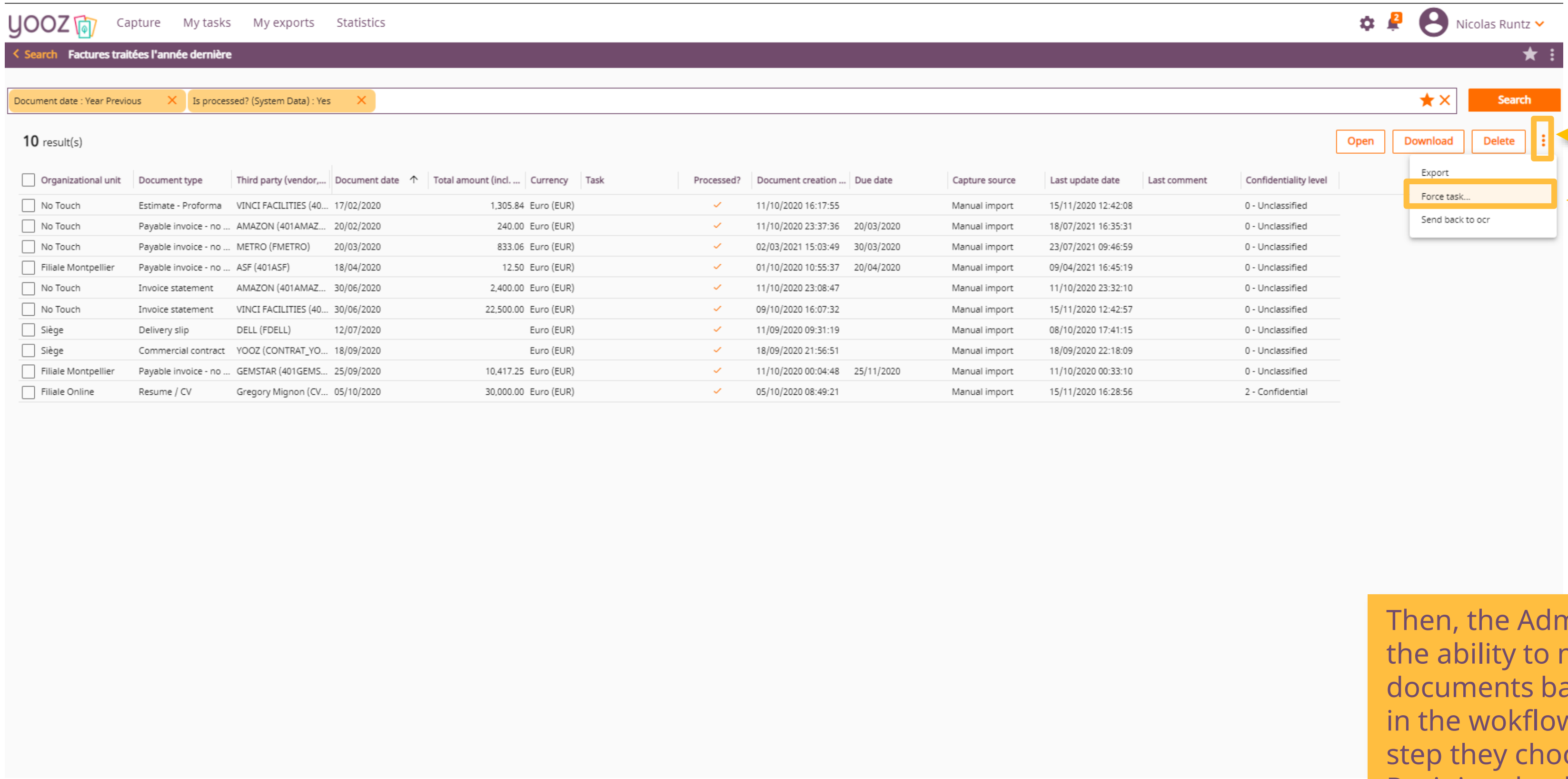
Force a task

- To Force a task, go to the Search Workspace.
- The prerequisite is the Administrator role.

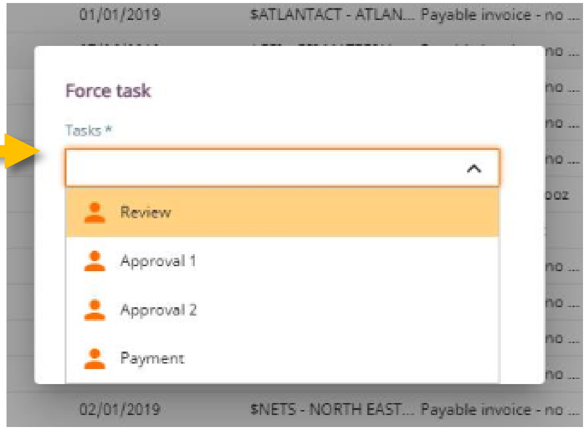


Organizational unit	Document type	Third party (vendor,...	Document date	Total amount (incl. ...	Currency	Task	Processed?	Document creation ...	Due date	Capture source	Last update date	Last comment	Confidentiality level
No Touch	Estimate - Proforma	VINCI FACILITIES (40...	17/02/2020	1,305.84	Euro (EUR)		✓	11/10/2020 16:17:55		Manual import	15/11/2020 12:42:08		0 - Unclassified
No Touch	Payable invoice - no ...	AMAZON (401AMAZ...	20/02/2020	240.00	Euro (EUR)		✓	11/10/2020 23:37:36	20/03/2020	Manual import	18/07/2021 16:35:31		0 - Unclassified
No Touch	Payable invoice - no ...	METRO (FMETRO)	20/03/2020	833.06	Euro (EUR)		✓	02/03/2021 15:03:49	30/03/2020	Manual import	23/07/2021 09:46:59		0 - Unclassified
Filiale Montpellier	Payable invoice - no ...	ASF (401ASF)	18/04/2020	12.50	Euro (EUR)		✓	01/10/2020 10:55:37	20/04/2020	Manual import	09/04/2021 16:45:19		0 - Unclassified
No Touch	Invoice statement	AMAZON (401AMAZ...	30/06/2020	2,400.00	Euro (EUR)		✓	11/10/2020 23:08:47		Manual import	11/10/2020 23:32:10		0 - Unclassified
No Touch	Invoice statement	VINCI FACILITIES (40...	30/06/2020	22,500.00	Euro (EUR)		✓	09/10/2020 16:07:32		Manual import	15/11/2020 12:42:57		0 - Unclassified
Siège	Delivery slip	DELL (FDELL)	12/07/2020		Euro (EUR)		✓	11/09/2020 09:31:19		Manual import	08/10/2020 17:41:15		0 - Unclassified
Siège	Commercial contract	YOOZ (CONTRAT_YO...	18/09/2020		Euro (EUR)		✓	18/09/2020 21:56:51		Manual import	18/09/2020 22:18:09		0 - Unclassified
Filiale Montpellier	Payable invoice - no ...	GEMSTAR (401GEMS...	25/09/2020	10,417.25	Euro (EUR)		✓	11/10/2020 00:04:48	25/11/2020	Manual import	11/10/2020 00:33:10		0 - Unclassified
Filiale Online	Resume / CV	Gregory Mignon (CV...	05/10/2020	30,000.00	Euro (EUR)		✓	05/10/2020 08:49:21		Manual import	15/11/2020 16:28:56		2 - Confidential

Click on the 3 dots.

Select Force a task

Then, the Admin has the ability to move the documents backwards in the wokflow to any step they choose. The Recipient by default it the user who processed the document in that step.



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New feature: the Attachment Add-on

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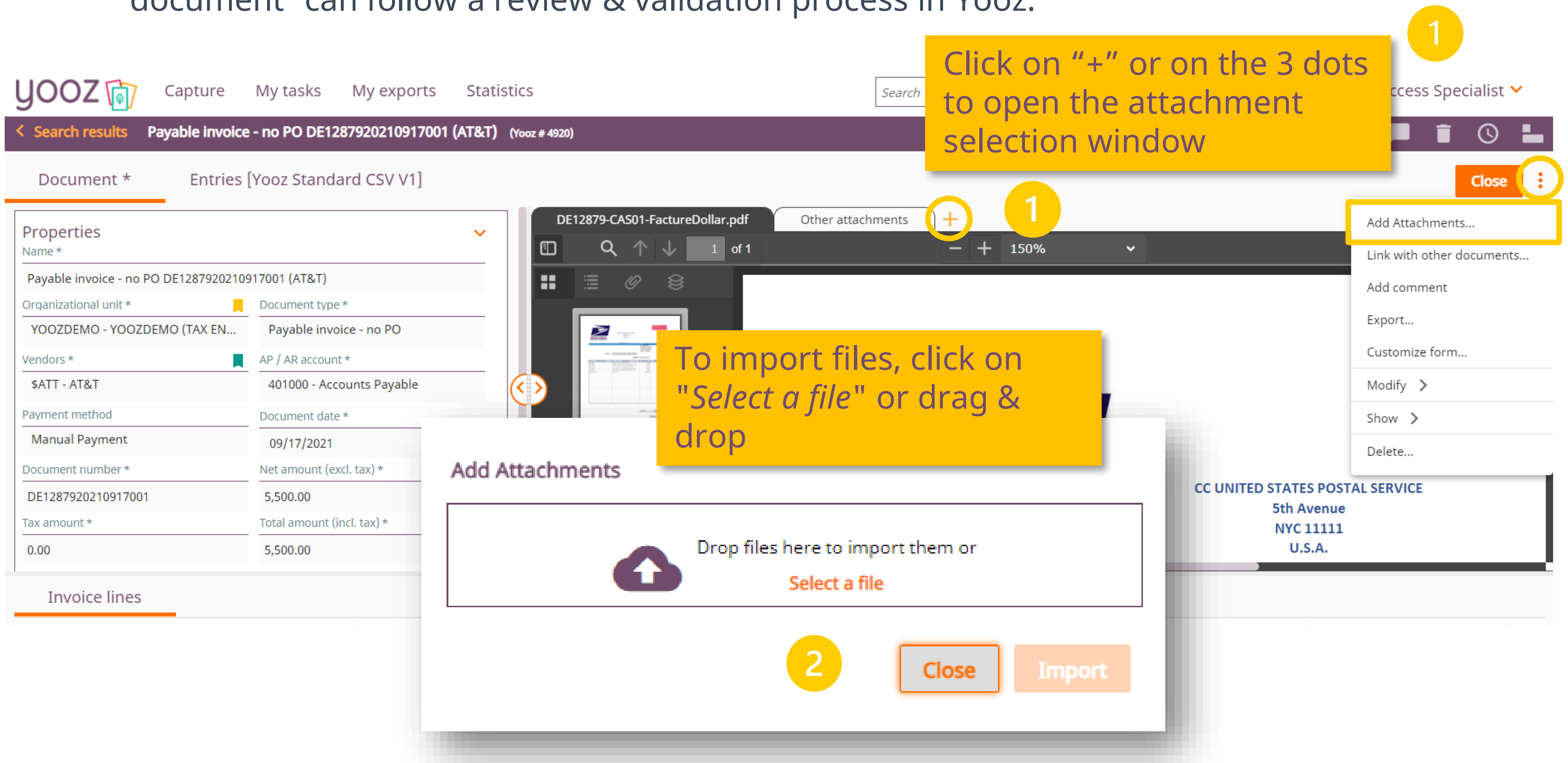
The Attachment Add-on

- An important factor in the review and approval process is to be able to rely on additional elements to support your decision. With the Attachment Add-on, these elements can now be added as attachments.
  - Attachments can be **added to a PR, to a PO, to an invoice…**
  - Attachments can be **.PDF, Word, Excel, images, voice memos, videos…**
  - An “attachment” is different from a “document” in Yooz. An “attachment” **cannot have its own review or validation process**. Only a “document” can follow a review & validation process in Yooz.



Interested ?

- Read these articles for more information:
- Attachment add-on – Users
- Attachment add-on – Admins
- If you wish to acquire the Attachment add-on, please reach out to Support

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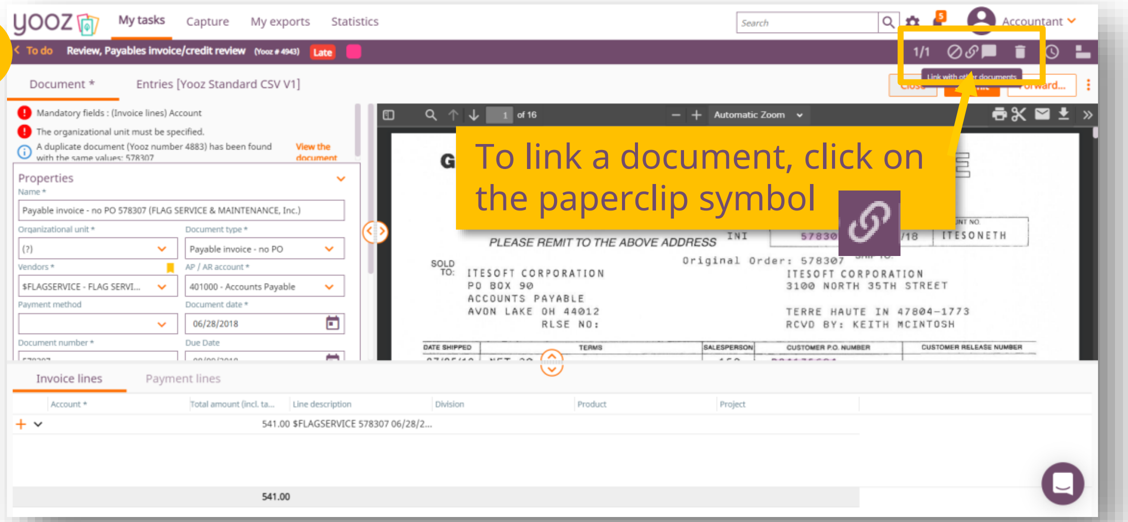
Until now, to associate two documents...

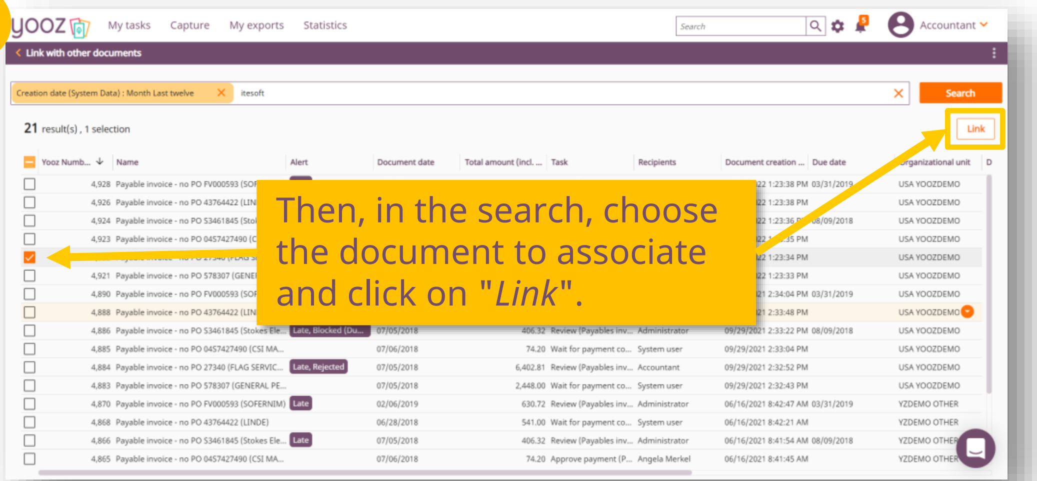
- Before the Attachment add-on, to associate 2 documents you had to use the Linked Document feature. Several drawbacks:
  - Capture the documents independently, then link them.
  - Open each document in turn to view the linked document.

1



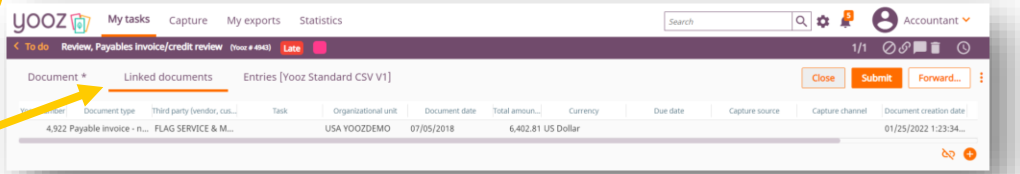
To link a document, click on the paperclip symbol

2



Then, in the search, choose the document to associate and click on "*Link*".

3



The associated document was then available in the "*Linked documents*" tab

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Active functionalities according to the nature of the elements

- It's important to understand the difference between a document and an attachment

	Attachment		Document
Definition	Any type of file associated to a document, and which is **not eligible to an automatic treatment process in Yooz**.		Any type of document (invoice, PR, PO, quote, etc.) **eligible for automated processing in your Yooz application**. A document may or may not be linked to another document. This is the notion of master document and linked document.
Formats	Word, jpg, png, gif, xls, ppt, mp3, wave, mp4… except for files considered as "risky" (see FAQ)	PDF	Any type of document that can be captured and converted to PDF.
Full-text Indexing	✗	✓	✓
Click & Reco	✗	✓	✓
Search	✗	✓	✓
Validation process	✗	✗	✓
Applicable workflow	✗	✗	✓
Comments	✗	✗	✓
Level of confidentiality	✗	✗	✓
History	✓	✓	✓

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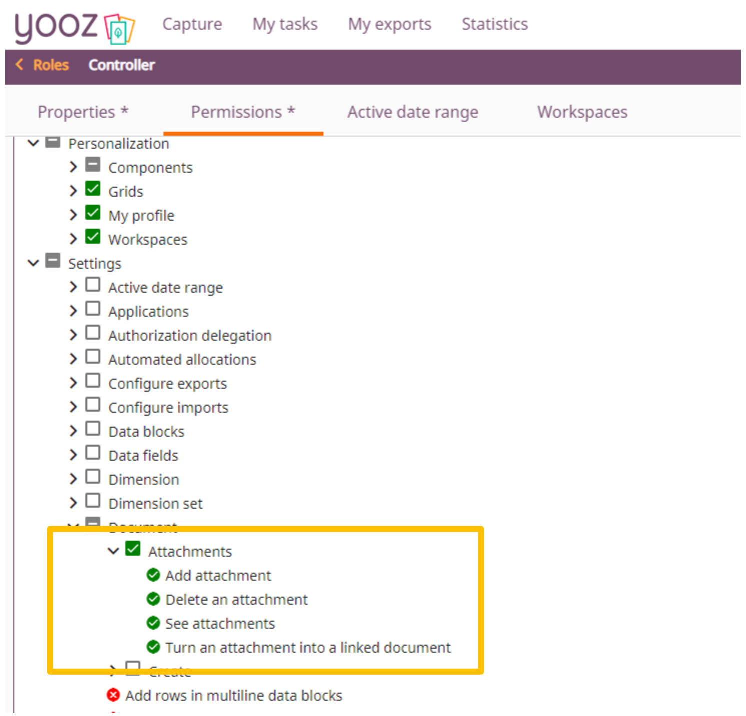
Setting permissions for attachments depending on user roles

- The setting of permissions related to attachments is done at the level of each user role
  - The permissions are set in *Settings > Roles > [selected role] > Permissions > Settings > Document > Attachments*
  - By default, when activating the Attachment Addon, all permissions are granted to all roles



- The administrator can activate or deactivate permissions per role:
  - To add attachments
  - To delete attachments
  - To see attachments
  - To turn an attachment into a linked document

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Questions / Answers