

CREATE YOUR FIRST TENANT

Tenant management System

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TENANT MANAGEMENT SYSTEM

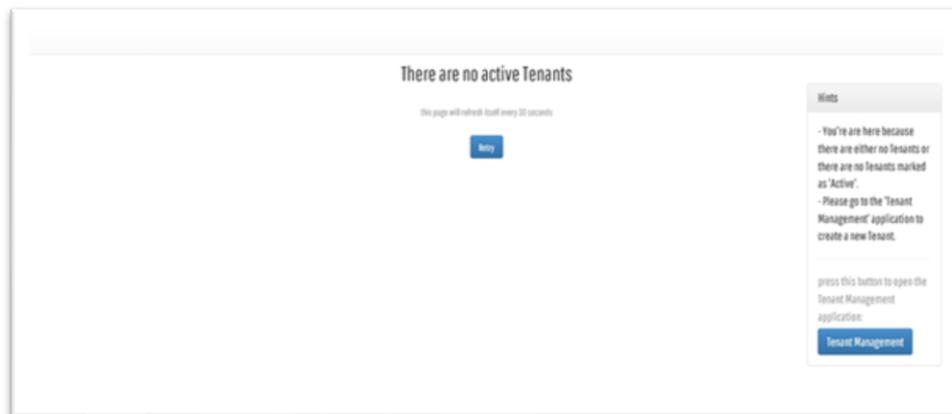
As part of the Installation a separate Tenant Management System (TMS) will also be installed. TMS allows for the management of Tenants and the monitoring of the Evaluate application.

The user responsible for Evaluate [typically the Administrator] must also belong to Administrators Windows Group to gain access to the TMS application.

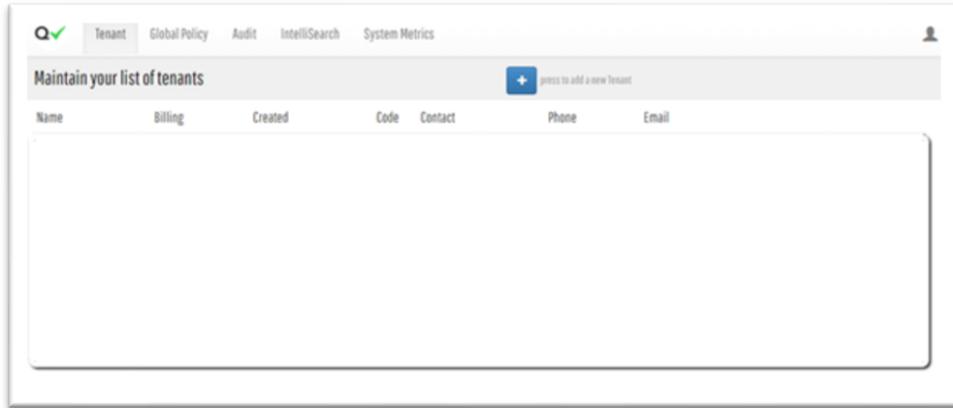
Before the Evaluate application can be used a Tenant must be created.

During the initial installation process the Tenant will be created. Each Tenant, or application instance, is self-contained and offers the full suite of functions. A Tenant might represent a single, discrete organization or, in larger businesses, separate elements of the same organization. Every Tenant requires its own unique id and data cannot be compared across Tenants.

This is the page the Administrator will see when they log into Evaluate for the first time.

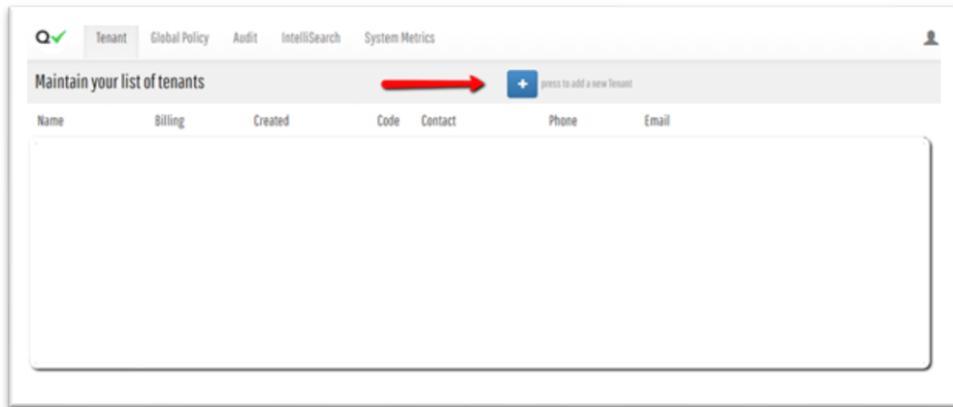


Use the Link to open TMS and create the first Tenant.



Add Tenant

Select the  button to add a new Tenant



A new Tenant properties window will open.

Basic Information

Enter the name the Tenant is to be known as within Evaluate together with an address and a description if required

Customize

The default names for Template, the Tenant itself and Units can be changed to fit the particular needs of an organization.

When a user logs into a Tenant that has been rebranded in this way they will see the new name used wherever the default name previously appeared.

The screenshot shows a configuration form with the following fields and options:

- Custom name for Tenants:** A text input field containing the word "Organization".
- Custom name for Units:** A text input field containing the word "Department".
- Custom name for Templates:** A text input field containing the words "Score Cards".
- Address:** A text input field containing the word "Compulsory".
- Install sample Templates:** A toggle switch currently set to "ON" (blue) next to the text "Install sample Templates".
- Footer:** A note stating "Sample templates cannot be installed after this point".

- **Custom name for Tenant:** Tenant is the built-in name for the highest level of the organizational hierarchy used in Evaluate Console. Enter a new name here to be used throughout the application if required.
- **Custom name for Unit:** Unit is the built-in name for the second highest level of the organizational hierarchy used in Console. Enter a new name here to be used throughout the application if required.
- **Custom name for Template:** Template- is the built-in name for the question Template that is used in Evaluate QM to score Evaluations. Enter a new name here to be used throughout the Evaluate application if required.

Install Sample Templates

A full Template containing Attributes and Definitions must be created and published before an Evaluation can be performed. To assist in this process a sample template can be created as part of the New Tenant creation.

Custom name for Tenants
Tenant

Custom name for Units
Unit

Custom name for Templates
Template

Address

off Install sample Templates

Sample templates cannot be installed after this point

Select the 'On' option to install the sample Template.
This option is only available at the point the new Tenant is created

Primary Administrator

Whenever a Tenant is created, part of the process involves the creation of a unique administrative User.

Enter the First and Last name of the new Tenant's Primary Administrator, the User who will manage the new Tenant's administrative functions, together with their Active Directory username.

The screenshot shows the 'Tenant' configuration page. The 'Primary Administrator' section is highlighted with a red box, containing fields for Firstname, Lastname, Username (Administrator@global.qualtrax.com), Telephone, and Email. The 'SMTP Settings' section is also highlighted with a red box, containing fields for Host (smtp.gmail.com), Port (587), a checked 'Enable TLS' checkbox, Username @ Domain (username.e.g. marvin@gmail.com), and Password. A green 'Save' button and a blue 'Cancel' button are visible next to the SMTP Settings section.

The Evaluate URL will be sent to the email address supplied in this section.

SMTP Settings

The SMTP Configuration option can be used to manage the delivery of emails generated from within Evaluate.

This screenshot is identical to the first one, showing the 'Tenant' configuration page. The 'SMTP Settings' section is highlighted with a red box, showing fields for Host, Port, Enable TLS, Username @ Domain, and Password. The 'Save' and 'Cancel' buttons are also visible.

Host: Name or IP address of the SMTP server to use for sending messages.

Port: Port number to use

Enable TLS: To transmit emails over an encrypted channel

Username: Specifies the username of the account that connects to the SMTP server.

Domain: The name of your email domain.

Password: Specifies the password for the username that connects to the SMTP server.

Q ✓ Tenant Global Policy ECM42 TSP23P Administrator

Tenant

Tenant complete

Tenant 1000 has been created!

- ✓ A new Tenant has been created
- ✓ An Administrator user has been created for this Tenant
- ✓ A temporary password has been assigned to this Administrator
- ✓ An Email invitation has been sent to this Administrator
- ✓ The Administrator must provide a new password

[View](#)