MGS
DIGITAL EXPERIENCE

MGS – Compliance Management

Installation Guide

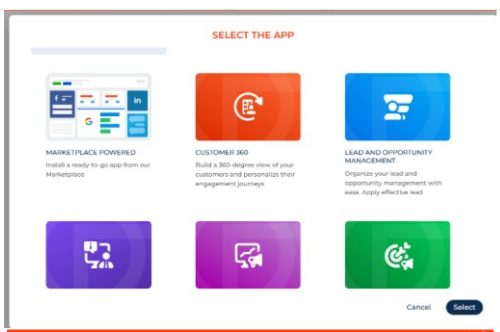
MGS

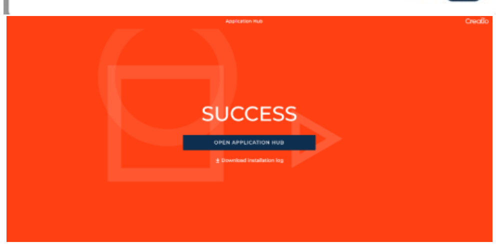
Contents

Chapter 1: Compliance Management – Prerequisites

Before installing the Compliance Management application, ensure that the following prerequisites are met:

1. **Access Requirements**
   - Ensure you have administrative access to the environment.
   - Verify that you have the required permissions to install new applications.
2. **Required Applications**
   - From the **Application Hub**, click the **+ New Application** button.
   - Search for and install **Customer 360** to the environment.



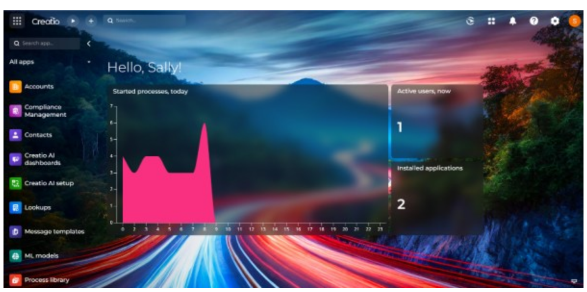


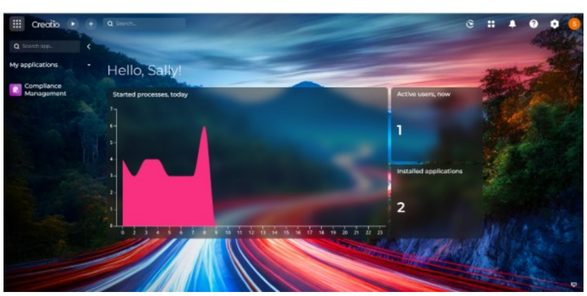
Chapter 2: Compliance Management – Installation Steps

Follow the steps below to install the Compliance Management application:

1. Navigate to the **Application Hub**.
2. Click on the **+ New Application** button.
3. Search for **Compliance Management**.
4. Click **Install** and wait for the installation process to complete.
5. Once successfully installed, navigate back to the **Application Hub**.
6. Run the **Compliance Management** application to ensure it is functioning properly.
7. Confirm that both **Customer 360** and **Compliance Management** applications are visible and active.

Commented [SC1]: Replace it with the official marketplace name

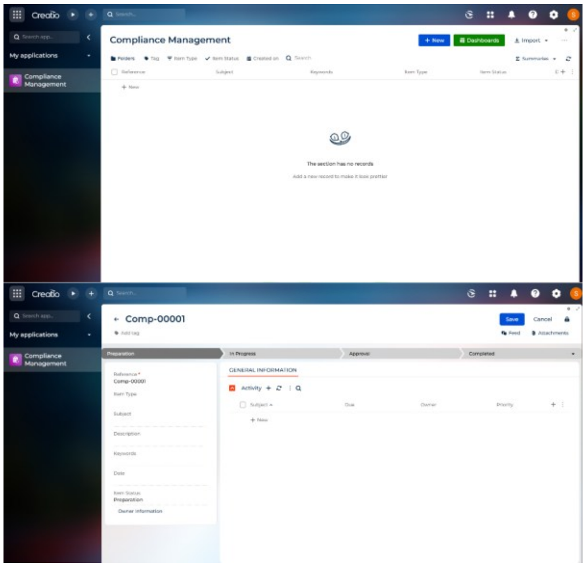




Chapter 3: Post-Installation Verification

After installation, verify that the application is properly configured:

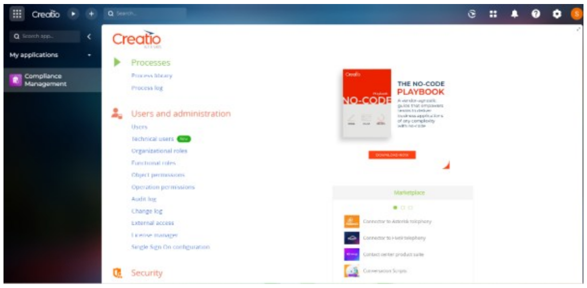
1. **Check Application**
    - Open the **Application Hub** and confirm that **Compliance Management** appears in the “My Application” list of installed applications.
2. **Run Initial Tests**
    - Launch the application and check for any loading errors.
    - Ensure all required modules and dashboards are accessible.
3. **User Access Verification**
    - Confirm that designated users can access the application without issues.
    - Validate that all necessary permissions have been assigned correctly.

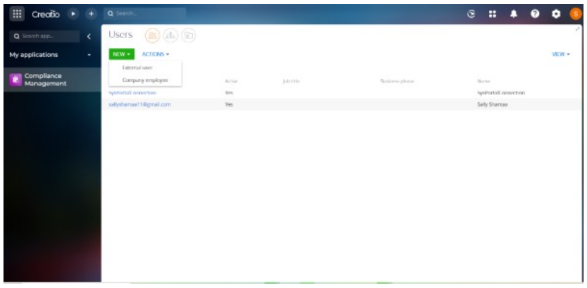


Chapter 4: Post-Installation Prerequisites

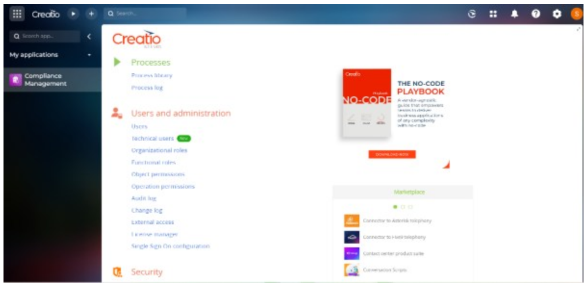
1- From the right side on the top left of the page:

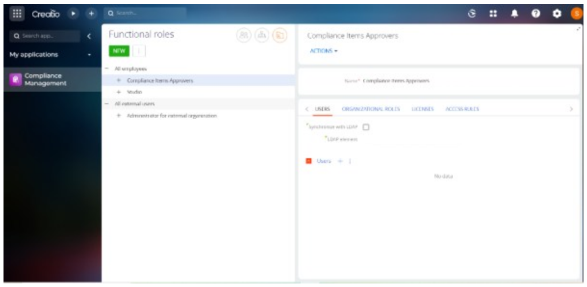
- Go to the users and start adding the "Company Employees" from the "Users" page.



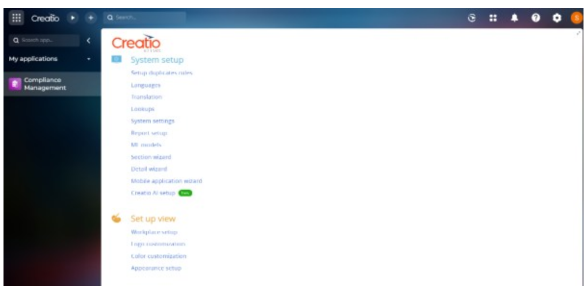


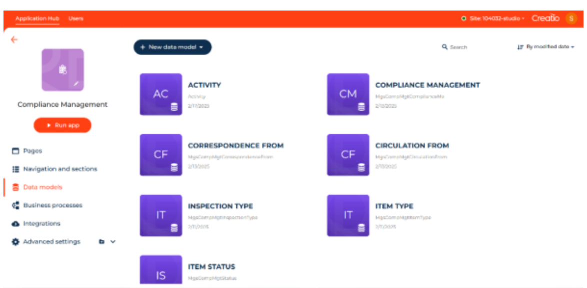
- Go to the "Functional Role" page and under the "Compliance Items Approver" add the users that are allowed to approve.

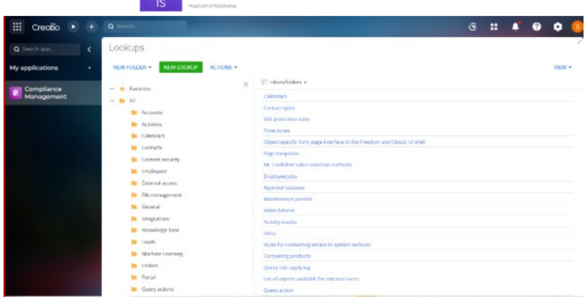




- Go to the Lookup Section, and start creating the lookups that are related to the data models (Correspondence From, Compliance From, Inspection Type, Item Status, Item Type).
- In the Lookup section, create a new lookup for each data model related.







Note: To start using the application, please follow the user manual.